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Virtual eChart Help

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Title page 1

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Virtual eChart Help

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All the people who contributed to this document, to mum and dad and grandpa, to my sisters and brothers and mothers in law, to our secretary Kathrin, to the graphic artist who created this great product logo on the cover page (sorry, don't remember your name at the moment but you did a great work), to the pizza service down the street (your daily Capricciosas saved our lives), to the copy shop where this document will be duplicated, and and and...

Last not least, we want to thank EC Software who wrote this great help tool called HELP & MANUAL which printed this document.

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Foreword

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placed between table of contents
and topics

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Top Level Intro

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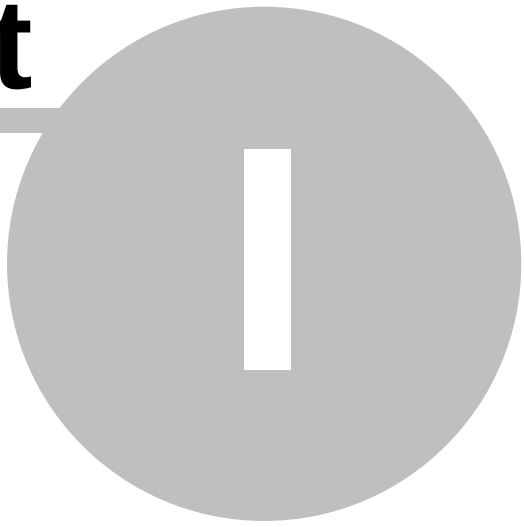
top-level chapter starts

Part



1 Introduction

1.1 Overview

Virtual eChart (**eChart**) is a WEB based software program that assists social service organizations in the conduct of case management. It is used to produce, maintain and report on case management data. This help document is intended to serve multiple purposes. It is an introduction to eChart, serves as a basic training aid and reference manual, and it is an integrated help system. Individual sections in this document are linked to from the corresponding functions and processes within **eChart** .

History

The inspiration for **eChart** was *Virtual Chart*, a program used by Service Coordinators at regional centers within the California Department of Developmental Services. The regional centers manage the delivery of services and supports to children and adults with developmental disabilities (clients). The direct delivery of these services is provided by resources, often referred to as vendors. Most Service Coordinators at regional centers work with clients but some work with resources.

eChart was designed and written by the authors of *Virtual Chart*. While offering the same functionality and satisfying the necessities of *Virtual Chart*, **eChart** is neither a derivative nor a variation of *Virtual Chart*; it is completely new software. Written on a more modern platform, **eChart** takes greater advantage of modern technologies, in particular, the Internet. It also addresses the new and ever changing needs of the social service community. For example, since the initial release of *Virtual Chart*, HIPAA requirements have been implemented and there is now a greater awareness of the need for confidentiality and security.

Goal

While *Virtual Chart* does a great job at providing tools for case management at institutional sized agencies, it is not downwardly scalable and could not provide a cost effective solution for the small organization or entities with a different focus. The primary goal of **eChart** is to provide all of the functionality provided by *Virtual Chart*, and where there are differences, provide flexibility and easy customization capability in a cost effective manner. **eChart**, then, is scalable and useful to a wide variety of social service agencies and, in fact, can be used by agencies of any size.

Variable Labels

eChart uses a 'label translation dictionary' to change terms throughout the system to conform to the terms your organization uses. For example, organizations may use the term 'Case Manager' or 'Service Provider' or 'Service Coordinator'. By changing the translation dictionary from 'Case Manager' to 'Service Coordinator', you will always see 'Service Coordinator' in the application. Another example; at one organization you might see a field labeled with the default 'Consumer ID' while at another you would see the same field labeled 'UCI'. These changes can be made for each agency in a simple maintenance function which is accessible to those with the proper permission level .

Basic Terms

First, let us define a few of the most fundamental terms used in this document keeping in mind that the term may be changed by your organization at any time as described above. As you become familiar with this document and in its use, these definitions should become clearer. A complete list of terms is presented in the Glossary 55 of this document and definitions are also provided as new terms are encountered in the text. In the appendices, you may find most field definitions described in greater detail. If you find a term you do not fully understand, take the time to look it up in the glossary to gain a better understanding. If you are unfamiliar with any of the following terms you should double click it to display the definition. You should do this before proceeding as these are some of the most fundamental and often used terms in this document.

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Service Coordinator
client
database
data window
case notes
Internet
medicaid waiver
page
source
transactions
UCI
vendor
window
WEB or world wide web

Some Abbreviations/Acronyms

Some terms are abbreviated throughout the document. Typically, the abbreviation will appear in parentheses after the first use of the term, except in the first few introductory sections. For example, **eChart**. These abbreviations may also appear in the glossary where they are defined. Here are some of the most often used abbreviations:

D.O.B.	Date of Birth
MW	Medicaid Waiver
POS	Purchase of Service
SIR	Special Incident Report

1.2 Visual Elements

Let's examine some visual elements of **eChart**. Once you become familiar with these elements, you will find it easier to navigate through the various windows and functions.

Title Bars and Menus

Depending on the browser you use and the display options you have set, **eChart** will display below some of your browser's bars and menus as shown on the browser page below. Your browser page may also have a task or menu bar along the left or right side of the page. The main application window where **eChart** will display will adjust to your browser, whatever other tool bars and menus may be displayed.

Title Bar

A title bar will display at the top of the primary window. The title bar contains the Logout button, which provides a means of exit from **eChart**, and a Help button, which will display the Help Document. Also displayed is the name of your agency (Account), your name (User) and the current date.

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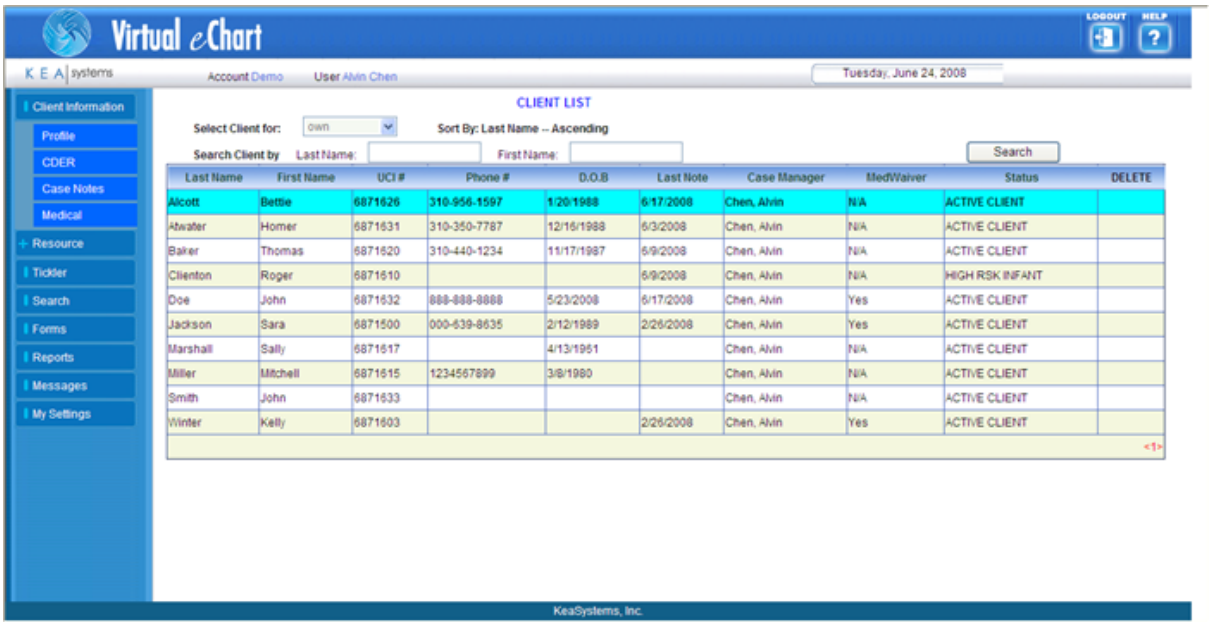
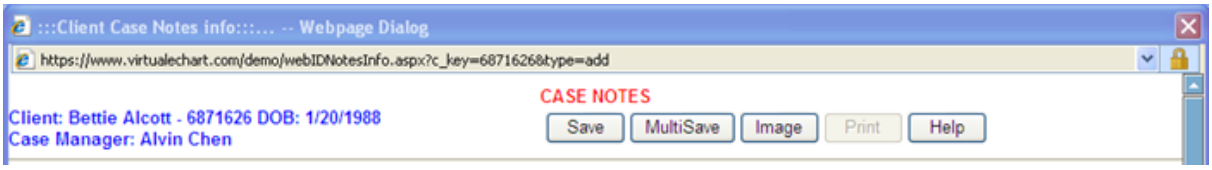


Menu

The example above shows the client list window which is the first window displayed when you login. Notice on the left, the navigation menu. The 'Client' option displays a second level of functions, or sub-menu, specific to clients. This menu is the primary navigation tool in **eChart**. When you click on an item under clients, or any menu item that takes you to a function or process, a new window will be displayed without the menu. This is a popup window and you must exit this window before returning to the prior window. Popup windows do not have the **eChart** title bar but a browser title bar. Shown below is a typical window title bar on the case notes window.



Note the you must click the exit button at the upper right corner to close the popup window and return to the prior window.

Common Icons

Help links to the **eChart** help document. This is a Windows compliant help system and if you are familiar with Windows help systems, you will have no problems navigating the eChart help system. The help system should be your first line of support and you should take the time to become familiar with it.

Logout effectively closes **eChart** and returns to the Login Window. Note that there is an inactivity time parameter set by your administrator that can cause an automatic logout. Because of

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the sensitive and proprietary nature of much of the data in **eChart**, this feature protects against your forgetting to logout and leaving your system for long periods of time.

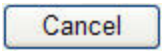
Delete removes a data element from the database. In most cases, especially where major elements of the database are concerned, for example the client record, the delete button will not be active or will not be available unless the data element has the appropriate status. In the case of clients, the status must be 'Inactive'. In any event, this is a function where extreme care and thought should be exercised.

View/Edit displays the selected item for viewing and editing. Typically, this icon will appear in a column of a list where other options are available. The icon may display 'View' or 'Edit' or 'View/Edit' depending on the allowable functions for the item.

Function Buttons

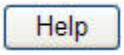
Data entry processing requires several common functions, which are executed by clicking on a button, available as appropriate on the window. These buttons are typically at the top of the window, just below the title bar and menu.

For data elements such as case notes, Clients, certain forms, etc. where multiple items are maintained in the system, the **Add** button allows for entry of a new record. The word 'Tickler' on the button shown would contain the name of the item being added, for example 'Add Case Notes' or 'Add Client'. The Add button is used to start the creation process for a new item. On the new item window, there will also be an Add button to store the record. When an item has been added and accessed again, the Add button is replaced with the Save button described below.

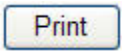


The **Cancel** button is used to restore the contents of a field or series of fields or window to its original state.

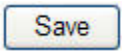
The **Delete** button removes a data element from the database. It differs from the Delete icon described above which is used primarily on lists, such as the client list. Its function is the same, however, and like the previous delete function, extreme care and thought should be exercised when deleting any record from the database.



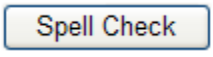
The **Help** button is used on windows without the **eChart** title bar, for example, 'Pop-Up' Windows. Its function, however, is the same as the Help icon on the eChart title bar.



The **Print** button sends the contents of the current browser page to the printer. It is, in effect, the same as the print function on your browser.



The **Save** button will save the current record to the data base after modification. This function is similar to the Add process but is used when a data element is being written to the database after being modified as opposed to being written for the first time.



The **Spellcheck** button starts the Spell Checker program when you are in a

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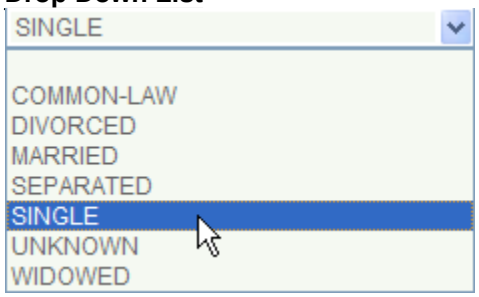
free form text field or on a window with many text fields to be spell checked. Note that if you have turned on the 'Auto Spell Check' option you do not have to manually spell check the data. Setting the option will be covered in a later section.

Other buttons that are specific to a particular window/function will be described in the section covering that window.

Controls

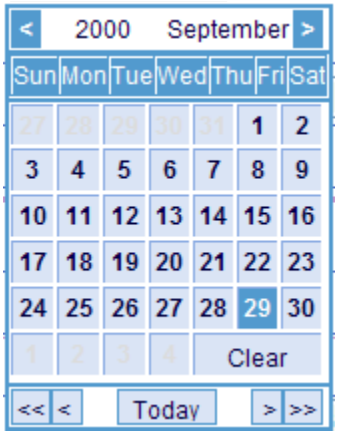
Controls are visual objects used to effect certain processes by the user, typically by clicking on the control. There are several types of controls used in **eChart**. For the most part, these controls are standard types, found in many Windows applications. They behave in the same manner as most Windows programs and could be described as 'standard' controls.

Drop Down List



Fields with drop down lists have a downward arrow on the right side of the entry field. Clicking in the field will display a drop down list. The list contains the valid entries for the field that you select by clicking the entry. Once the entry of the list has been selected, or you click outside the field, the list will disappear. Typically, the first entry of the list is blank, which allows for no entry.

Calendar Control



The calendar control will be displayed whenever you click in a date field. It allows for a more intuitive and faster entry of a date. To select a date, click on the date in the calendar. You may use the arrows at the top of the calendar or the single arrows at the bottom to change the month. You can also click on the month and select a new month from a drop down list. Use the double arrows to change the year or click on the year to select the year from a drop down list.

Radio Buttons

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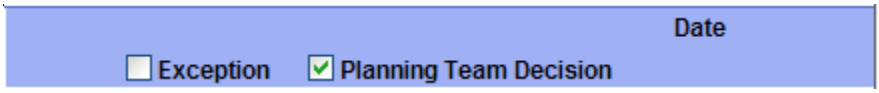
Radio buttons are always grouped and represent options. Each option is accompanied by a brief description of the option, either on the left or right of the button. Within a group of radio buttons, only one option may be selected and active. In this example, radio buttons are used to give the user the ability to choose an approval status.

Check Boxes



Check Boxes are similar to Radio buttons except they allow selection of more than one option within a group.

Using Color

Another very important element of windows is the color scheme or use of color to indicate a particular attribute. Here are the important text and background colors used to improve the intuitive process.

- 5/30/2(**Black** is the default color of text that is entered by the user, text in titles, drop down lists, column headings and field labels.
- SPANI **Gray** is used when text is entered via drop down lists.
- Consu **Red** is used to emphasize certain text, for example, section headers or important data fields.
- Vendo **Light Aquamarine** is used as a background color to indicate data entered as 'informational' which originates from another data record. For example, when you enter a vendor number on a form, the name is typically displayed in this manner. You cannot change this data.
- **Aquamarine** is the background color for the navigation menu.
- Consu **Dark Aquamarine** is the background color for the menu items; note the white text.
- ID Not **Blue** is the background color for sub-menu items; note the white text.
- 2. UCI: **Light Royal Blue** is the background color for field labels and column headers.
Consumer94 Test94	6871593	
Consumer97 M Test97	6871596	000-973-8898
Consumer00 J Test00	6871599	000-637-4439
Consumer92 J Test92	6871591	000-888-7864
Consumer88 E Test88	6871587	000-379-0879

  Striped rows (**yellow/beige** alternates with **white)** are used to improve readability on lists. **Turquoise** indicates the selected row.

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You should familiarize yourself with the various colors used throughout **eChart** as they are an important means of conveying information.

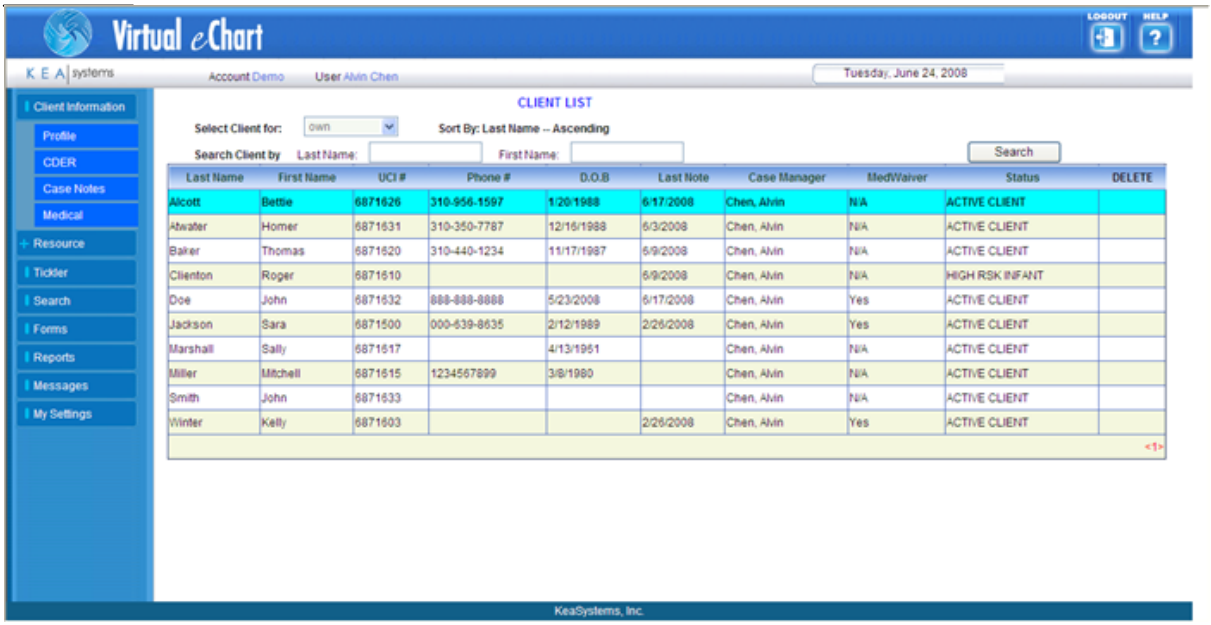
1.3 Functions and Processes

Navigating **eChart** is accomplished primarily through the menu and function buttons. As you can see on the window below, there is a vertical navigation menu on the left side of the window. The items and sub-items on the menu are links to other windows or functions. This is the initial window displayed after logging in.

Major Windows and Functions

The following is an overview of the major functions and processing options. More comprehensive discussions of these functions and processes are included in following sections.

Client List



The window above is displayed when you login to **eChart** or whenever you click the 'Client Information link at the top of the menu and is covered in more detail in a following section.

Resources

The Resource list is similar to the client list. The resource list and the Resource Profile, contain information relating to the resources (or vendors) your agency deals with or that are available to your agency.

Tickler

The Tickler function is a reminder system. It is typically used to facilitate compliance, such as periodic client plans.

Search

Search helps you find client(s) or resources using various search criteria.

Forms

The Forms function allows you to enter and process many forms used by your organization.

Reports

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Reports will display or print a variety of reports.

User Settings
This function allows modification of various processing parameters and options including your password

Administration
This is a series of functions reserved for the system administrator. Functions include the setting of agency specific terms, for example, the default term 'consumer' could be changed here to 'client' and that term would then replace the default term wherever it appeared in the system.

Client Process

The primary purpose of **eChart** is to produce, maintain and report on data related to clients. Collectively, the client data is referred to as the client or case chart. The functions used to produce this data are described briefly here and in more detail in following sections.

Profile
The Profile window (Profile, General Info and Face Sheet are used synonymously) is the primary collection point for personal, demographic, status and other information related to a client or resource. You access a client profile from the client list by selecting the client (click on a client line) and then click on the Profile function. If you want to add a new client, you will be taken to the profile by clicking on the 'Add Client' button on the client list window.

CDER
The CDER or Client Development and Evaluation Report, like the profile, is a major collection point for client data. It is used to view a client's diagnostic characteristics and to measure and evaluate, on an ongoing basis, the client's functioning levels.

Case Notes
Case Notes are the primary documentation element for clients. They provide a chronicle of relevant activity and milestones for a client. As such, they enhance and detail the reporting in periodic reports and forms. Case Notes are often referred to as ID Notes (Interdisciplinary Notes).

Medical
The Medical window provides for collection and reference to a client's medical data. Although medical information is provided on the profile and CDER, this window provides greater detail and also provides for medical history of the client and the client's family. The Medical form is typically highly customized for an organization's needs.

Editing Functions

Several windows in **eChart** contain large free form text fields. All of these text fields are processed with the same editor which is really a simple word processor. Like most word processors, there are tools available to you that facilitate text entry.

Where active and appropriate, the spellcheck icon will be adjacent to the text field, typically, just below as shown in the case notes window.

Spellcheck Window

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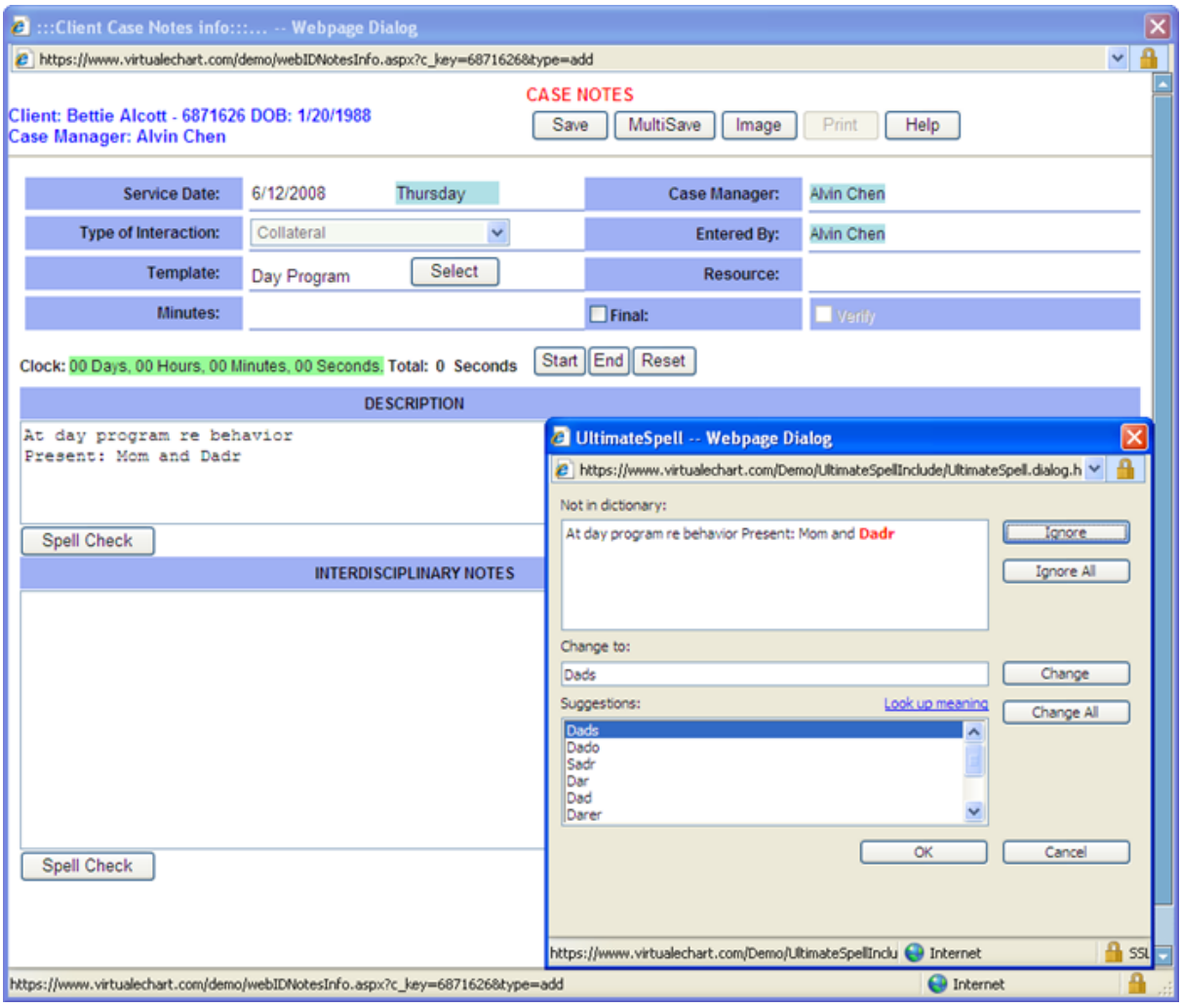

Note that the Spell Check window is a Pop-up window which is typically smaller and displays on top of the case notes window. The spellchecker used in **eChart** is similar to those used in popular word processing systems and is very intuitive.

Standard Editing Functions

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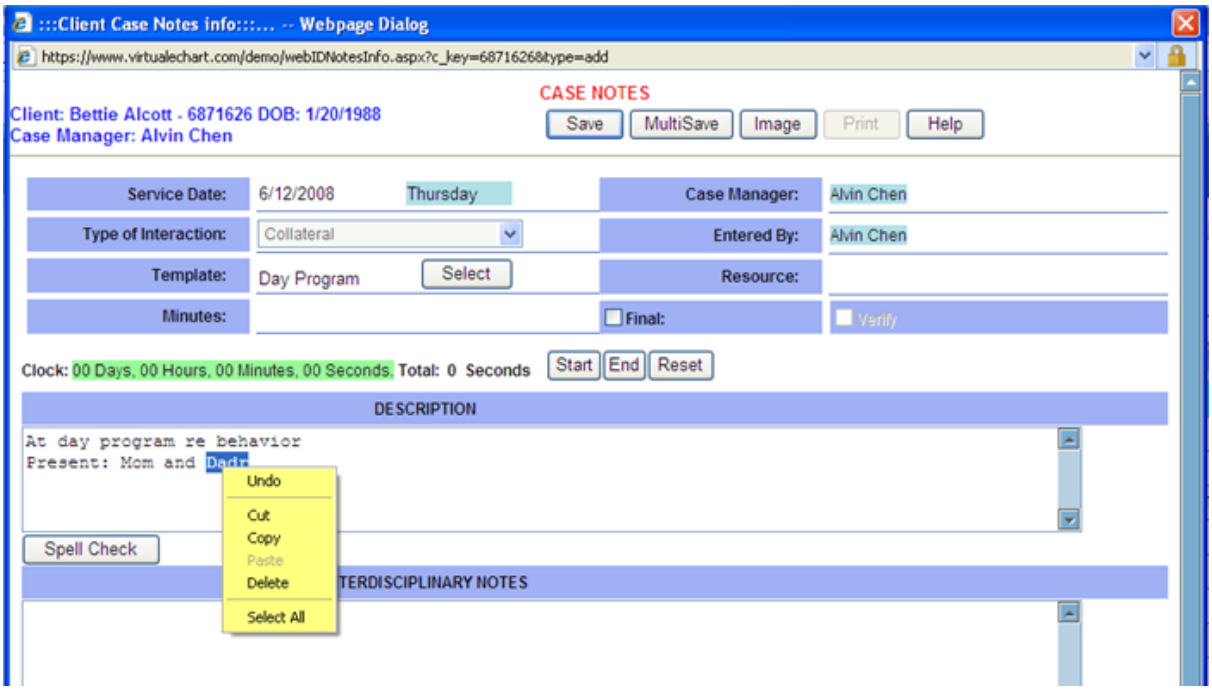

Standard Windows editing functions are available to you and can be very helpful when entering or modifying text fields. The highlighted edit menu above shows the typical functions available to you. To display the edit menu, select (highlight) the text you wish to edit, then right click. Once the menu is displayed, simply click the option on the menu or enter the letter underlined in each edit function.

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Top Level Intro

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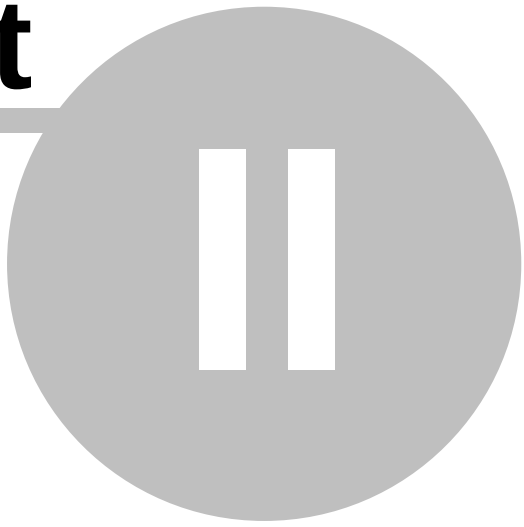

2 Getting Started

2.1 Logging in to Virtual Chart

Starting Virtual eChart

eChart is started by entering its 'URL' (site address) in the address field of a browser. You may put the link in your favorites or bookmark menu so that you can subsequently enter **eChart** with a single click. Your system administrator or support specialist may set up an icon on your desk top as a short-cut to **eChart**. When you've entered the URL, the following window is displayed in your browser.

Note that a period of time is set for automatic log out by the system. This happens when the specified time (set in User Setting which is covered later) has expired without keyboard activity.

Login Window

You must enter your Account ID, assigned user name and your own settable password. Initially, the password will be blank so you can just press enter. You may set and change your password in the User Settings function. Much of the data in **eChart** is proprietary and/or confidential. Additionally, if you are entering data, you are responsible for the integrity of that data. It is therefore imperative that you protect your password and change it periodically according to your organization policy. While it is not required, it is strongly suggested that you use the Windows format for passwords: at least seven characters from three of the following character groups: English upper case letters (A through Z); English lower case letters (a through z); numerals (0 trough 9); and Non-alphabetic characters such as (! @ # $ % ^ & * _ ?).

2.2 Settings & Options

Setting Defaults, Options and Other Parameters

Certain default values and parameters are defined in the My Settings function. Others are set in Administration functions by your system administrator. These settings effect certain functions and processes in **eChart** and should be set up before you begin using it in earnest. Keep in mind as we explain the different fields, that they come pre-set with the defaults. You should learn and consider

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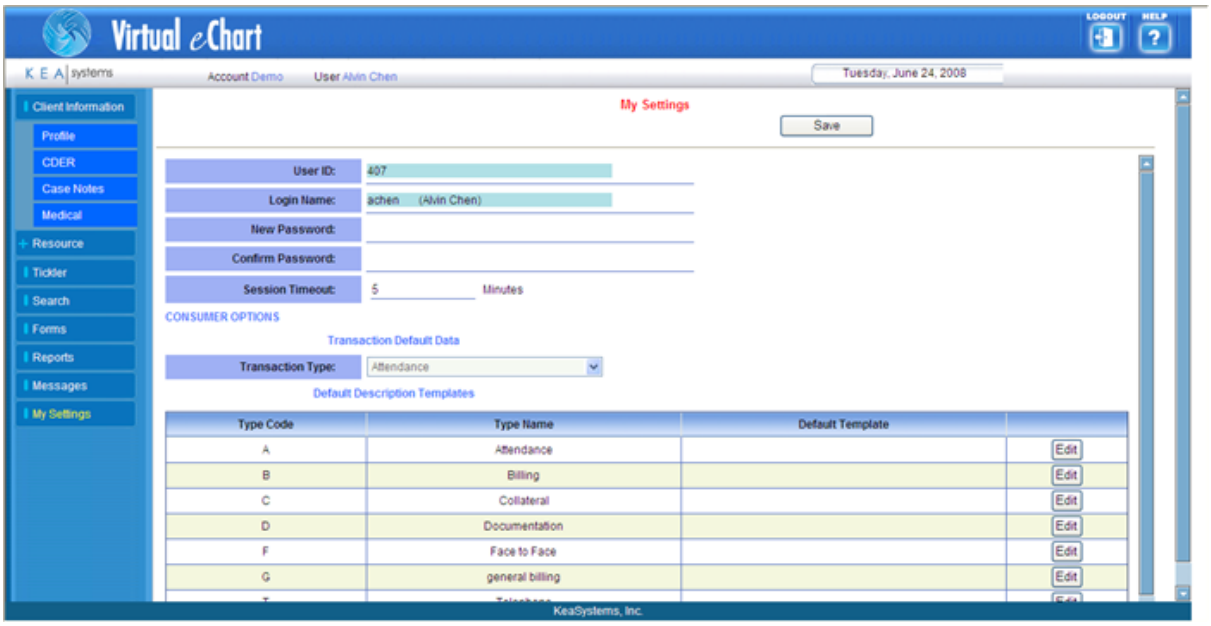
your organization's policies before you change these defaults. In general, you should exercise care when making modifications or ask for direction from your support staff.

User Settings



User ID and Login name
As you can see, the My Settings window has informational fields with the backgrounds highlighted indicating that these are pre-filled. These are your User ID and Login Name. They are set by your system administrator and cannot be changed here.

Password
The next two fields allow you to change and confirm your password. While it is not required, it is suggested that you use the Windows format for passwords: at least six characters from three of the following character groups: English upper case letters (A through Z); English lower case letters (a through z); numerals (0 trough 9); and Non-alphabetic characters (! @ # $ % ^ & * _ ?). Remember that passwords are case sensitive.

Session Timeout
This is the number of minutes without activity before you will automatically be logged out of the program. This is a security measure because of the nature of the data. Your agency should have a general policy about security, for example, regarding HIPAA compliance. If you do not know the specific policies regarding session time outs, you should ask your system administrator. When the system 'times-out', a warning message will be displayed indicating that you have been logged out. When you respond to this message, the system will close the current window and return you to the Login window.

Default Transaction Type
The Transaction Type and the Default Description Templates correspond to the description field in the Transaction window. Changing the Type will cause the Template field be auto filled, whenever you enter a new transaction, with the default data you set here.

Default Transaction Description Templates
eChart supports the use of templates for entry of the case notes. Based on the transaction type, the default template will change and you may also select from a number of templates that your agency

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has made available.

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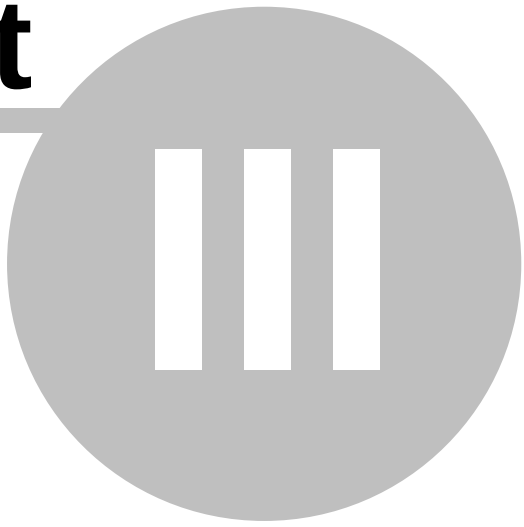
top-level chapter starts

Part

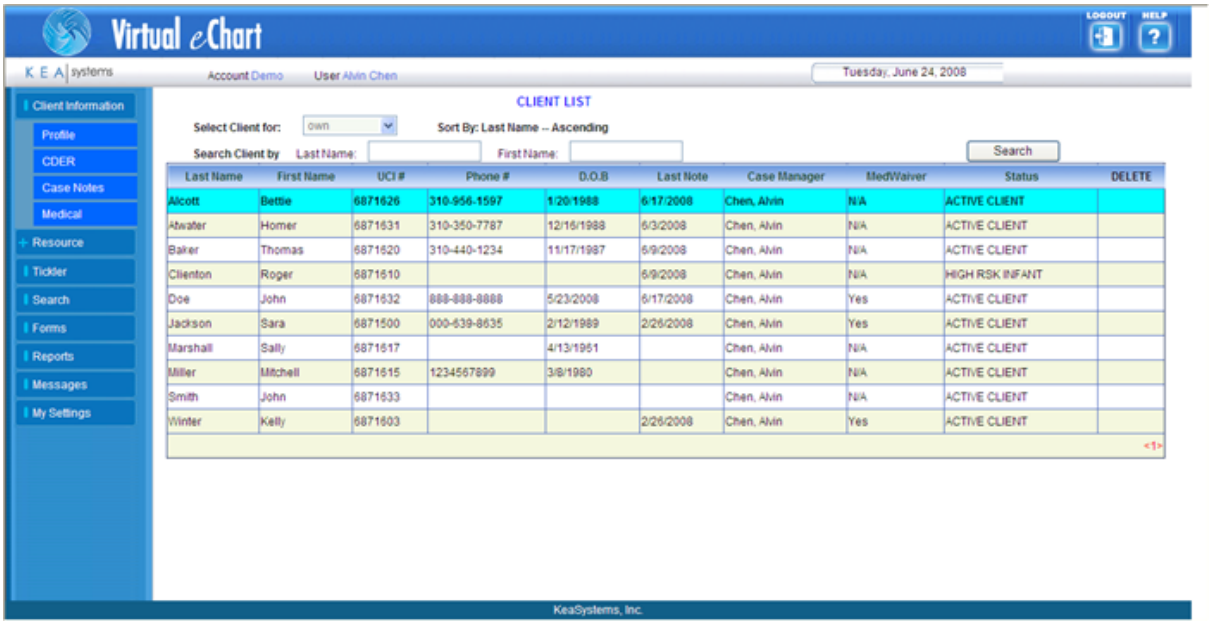


3 Major Functions and Processes

3.1 Main Window

The window below is displayed whenever you login to **eChart** or when you click the 'Client' link at the top of the menu. The top title bar contains a Logout button which allows you to exit the program and return to the Login Window. The bar also contains the Help button which will display this help document. This title bar also contains your account and user name as well as the current date and it is displayed on all primary function windows.

Main Window - Client List



When the list is initially displayed, the first row is highlighted. If you click on any other row, that row becomes highlighted and the highlighted client becomes the default, or current client. If you then select the profile or if you select one of the sub-menu selections under Clients, the default client will be selected. This also applies to certain forms and reports that are specific to a particular client.

The selection of a client before entering the various client specific functions and processes facilitates the way most Service Coordinators work. For example, you might enter the required monthly report form for a client. During this process, you may call the client, parents, medical consultants, etc. Finally, upon completion, you will save the report, update the Tickler and enter various case notes to document your work. You might then return to the client selection window, select another client and complete a similar sequence. By having the default or current client always active allows functions to default to that client, making it unnecessary to re-enter the Client ID.

Which clients are displayed is determined by the 'Select Client for:' field. Initially, your own consumers are displayed as indicated in the drop down list field. The other choices are 'other' and 'all'. Selecting 'other' displays all consumers other than your own and selecting 'all' displays all the consumers your agency has in its database.

Search
You may search for a particular client if your displayed list is long. You can search the list by Last

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Name or First Name. If the client is found, the list will display the client line and make that client the current client. If your list is very long or you have other information other than names, you can use the Search function on the menu bar.

Sorting
The column headings provide a description of the column but also allow you to change how the list is sorted. By clicking on any column heading, you will make that column the 'sorted' column. Click the column heading again and the list will reverse the sort order for that column. That is, each time you click the same heading, the list will alternate between ascending and descending order of the column you click. The current sort order is displayed in the top section of the window 'Sort By:'.

Delete
The Delete icon in the last column will remove a client from the database. The icon will not appear unless the client has an 'Inactive status. When deleted, the client is actually only flagged as deleted and removed from the list, it will still remain in the database and all associated records will also remain. However, you will no longer have access to this client and the only way to restore the client is through a system administrator function. Obviously, extreme care should be exercised here. Before the client is deleted, the program will query if you really want to delete the client.

Add Client
The Add Client button will allow you to enter a new client by taking you to an empty profile.

3.2 Client Profile

The Client Profile is the collection of much of a client's data including personal, demographic, general medical or psychological data and the status and dates of required reports and events. More detailed diagnoses and evaluations can be found in the CDER. Other, more transient data can be found in periodic plans, eligibility and other forms, and of course, the case notes. There are 6 tabs on the profile. We will cover the most important aspects of the profile here as most fields are highly intuitive, if not obvious, such as 'Name:', 'D.O.B.', 'City:', etc.).

Note: The processing of this data, other than for viewing, may be based on permissions. You should be familiar with your agency's policies in this area and if you are in doubt about your permission level, contact your system administrator or supervisor.

Profile Window - Face Sheet Tab

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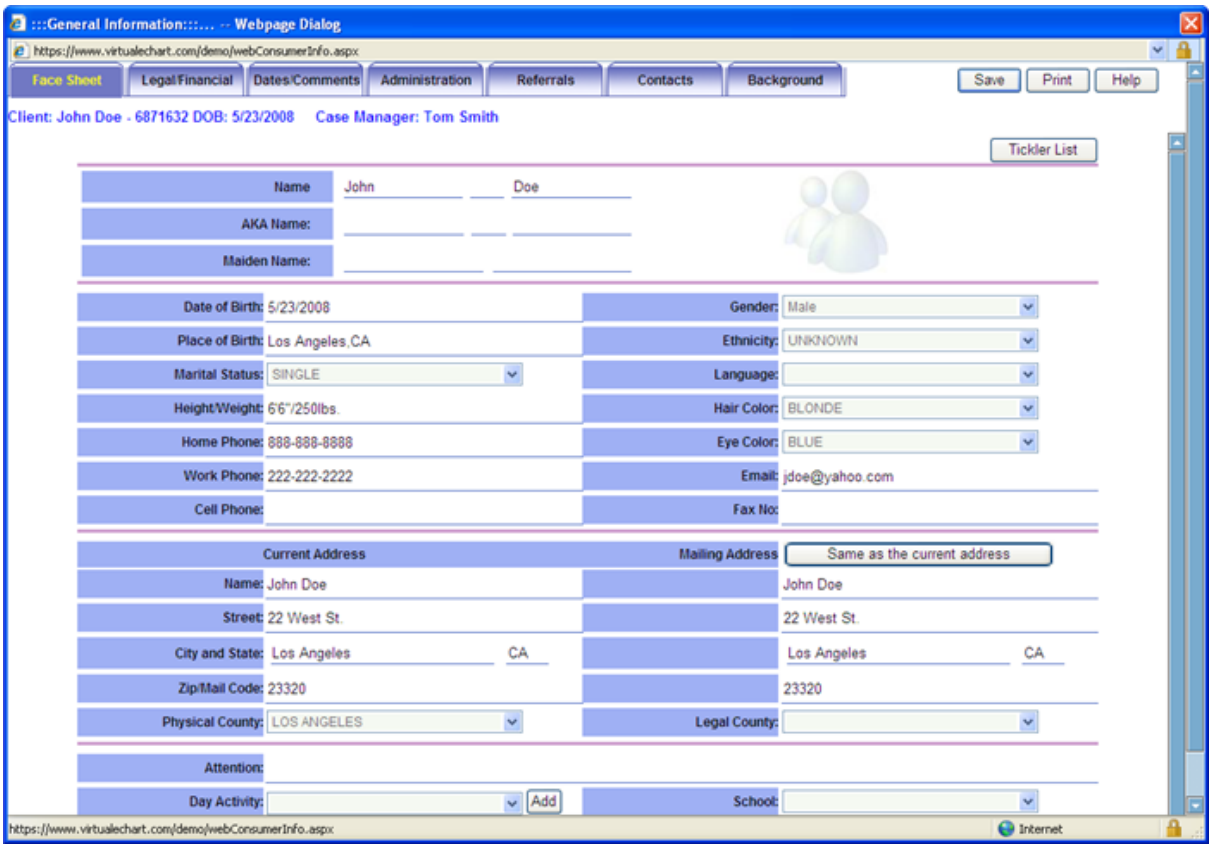

This is the basic client information and most fields are intuitive or clear as to their contents. Other fields that may not be obvious are entered via drop down lists. We will describe some less intuitive fields or those that may require special processing.

Picture

To the right of the Name fields is an opaque representation of a picture. When you click this image, a Popup window will appear which will allow you to browse to an image file. The browse button allows you to browse your local computer. When you select a picture, a preview will be displayed and when you click on the 'Upload' button, the image will be uploaded to the **eChart** server for permanent storage. Thereafter, the image will appear whenever you display this client's profile.

Attention

This field is for any special, important information that a user must be made aware of. For example, the entry may contain 'Client has often committed acts of violence on Service Coordinators.'

Profile Window - Legal/Financial Tab

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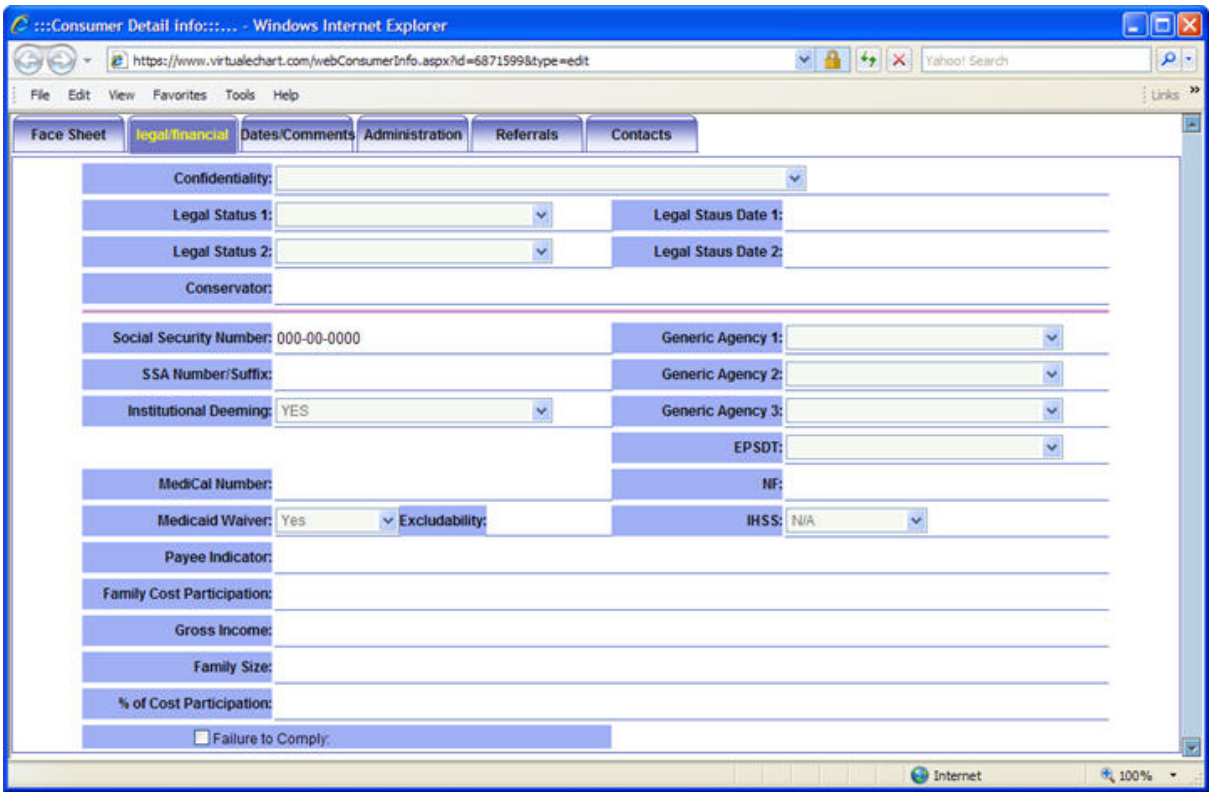

Confidentiality

This is a drop down list that indicates whether restrictions beyond normal agency confidentiality are placed on dissemination of client data.

Profile Window - Date/Comments Tab

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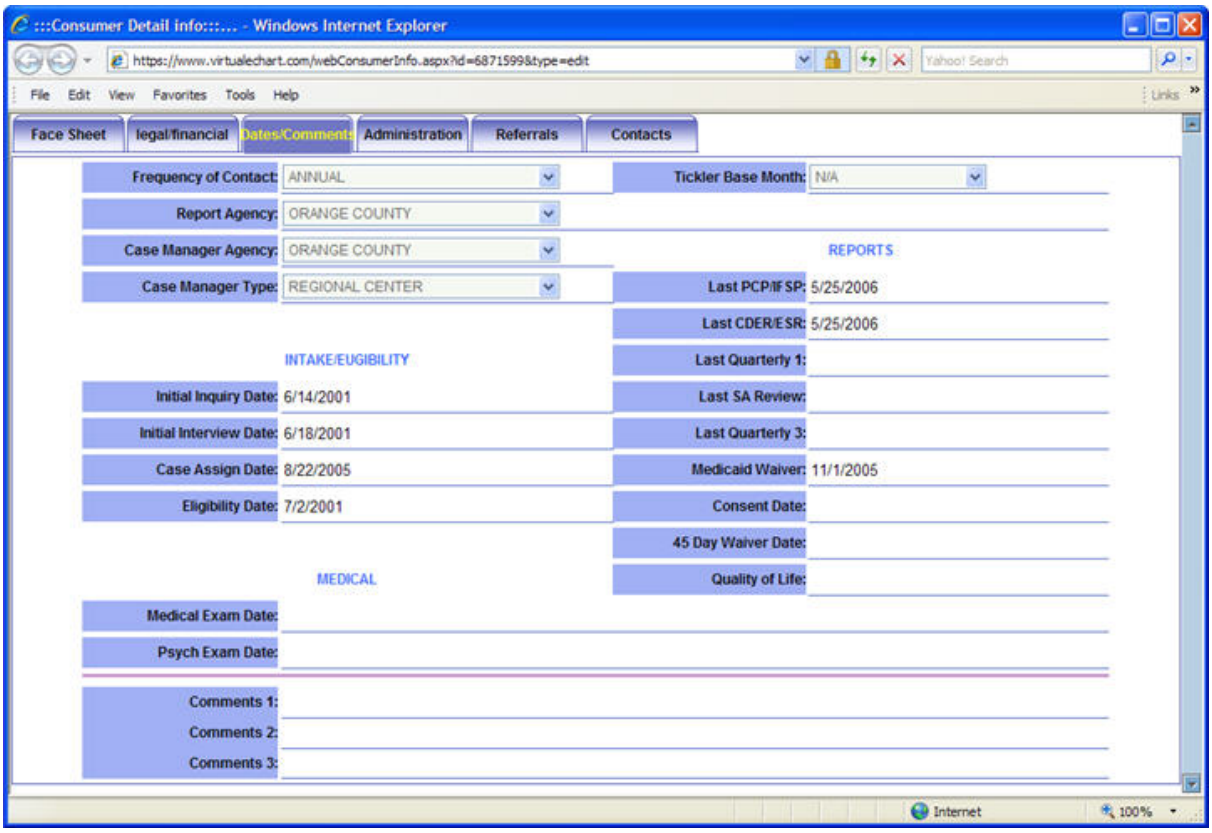

Comments

On the Dates / Comments and Contacts tabs, there are groups of date fields and three fields. The comment fields are for miscellaneous comments or notes not contained in other fields or additional information relating to another field. Your organization's policies will dictate how you should use these fields.

Tickler Base Month

This is the base or starting month for periodic reports required on a scheduled frequency. See the Tickler function in a following section.

Profile Window - Administration Tab

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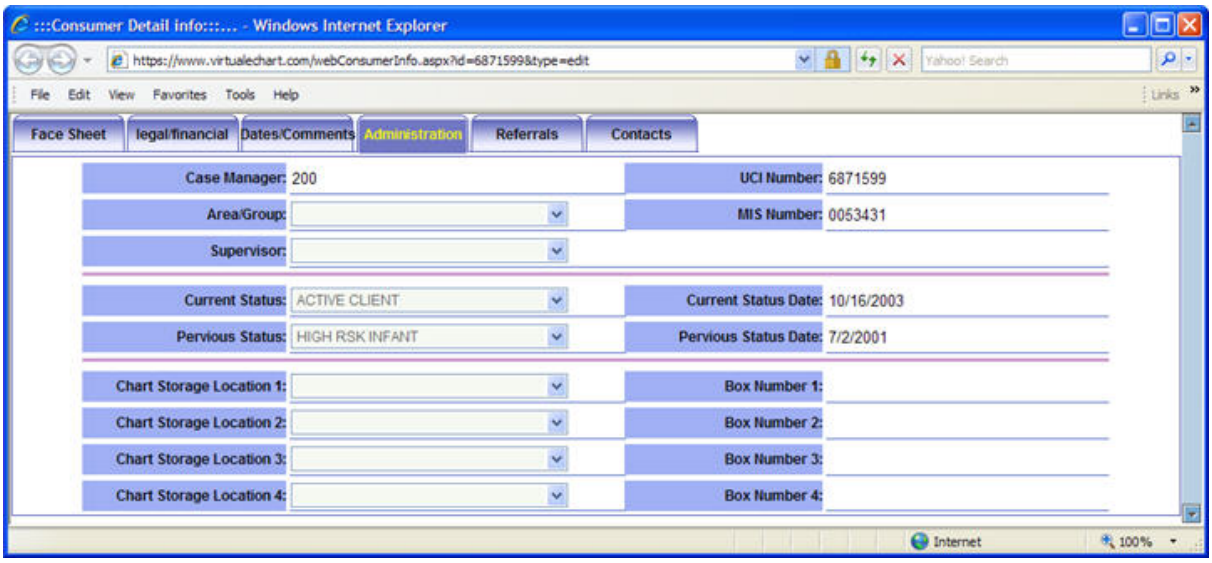
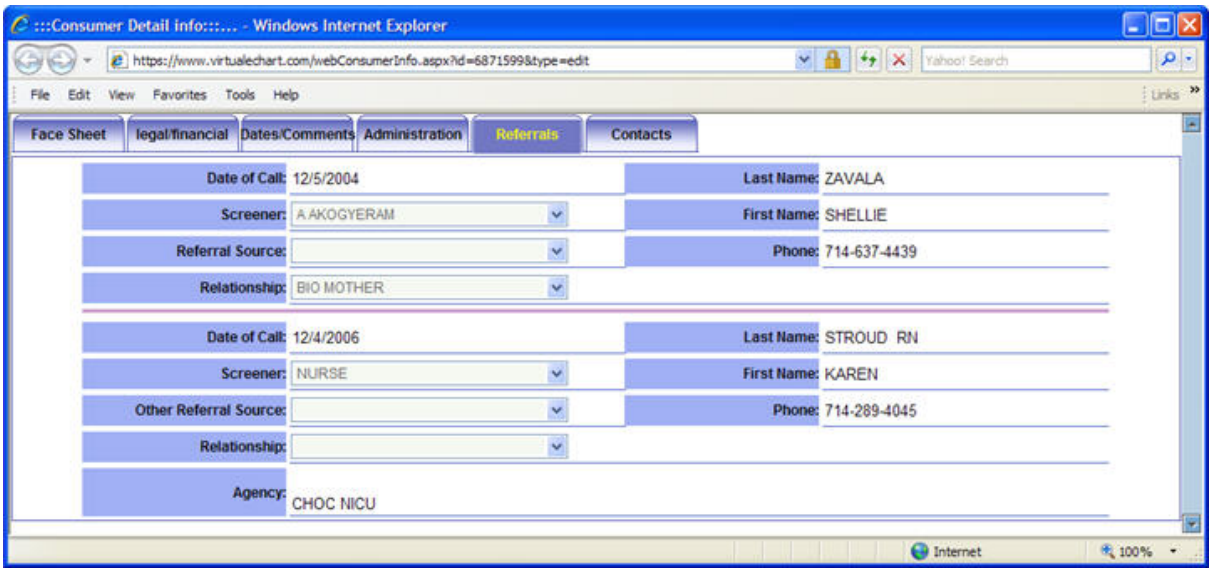


Chart Storage Locations / Box Numbers

Note that several fields at the lower end of the window have blank labels. When records are stored off-site, these fields indicate where they are. The drop down lists in these fields are set up by your organization.

Profile Window - Referrals Tab



Contact information for those individuals or organizations involved in the referral of the client may be entered on this tab. Your organization policies will dictate how and what data is entered and retained. The contents of the drop down lists are also under the control of your administrator.

Profile Window - Contacts Tab

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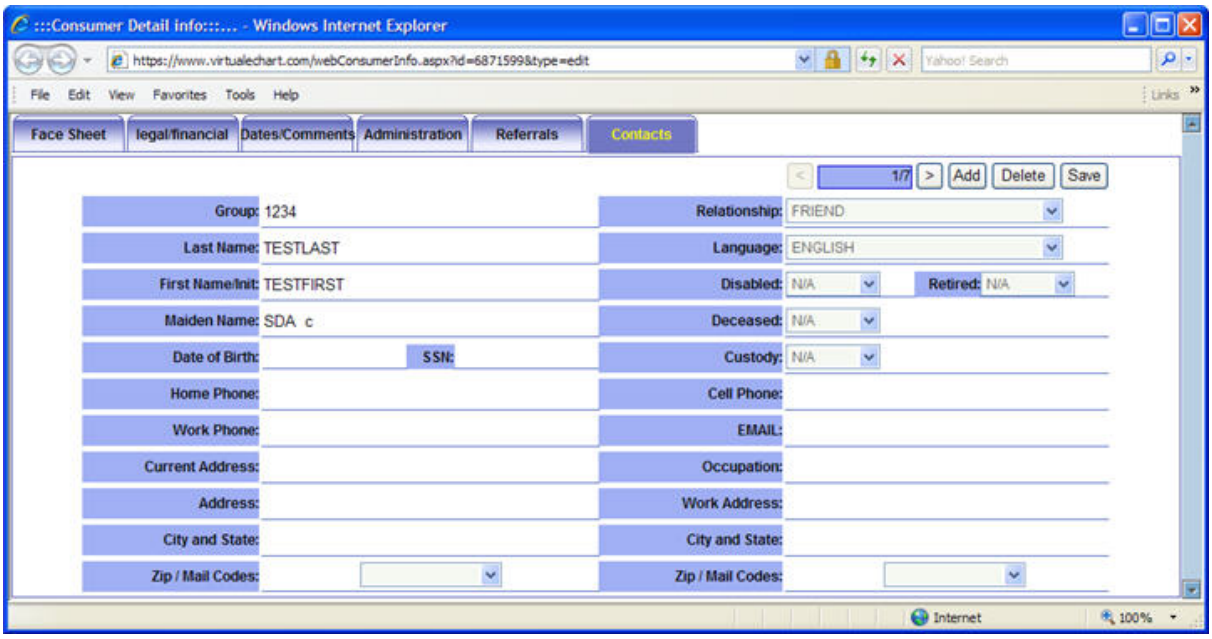

The Contacts tab contains the information regarding persons or entities important to the client, such as parents or guardians, doctors, etc. You may be more familiar with the term Significant Other. There is often more than one contact for a client so the data window has a set of navigation and function buttons on the upper right corner so that you can view them all, add, delete or save them.

Profile Window - Background Tab

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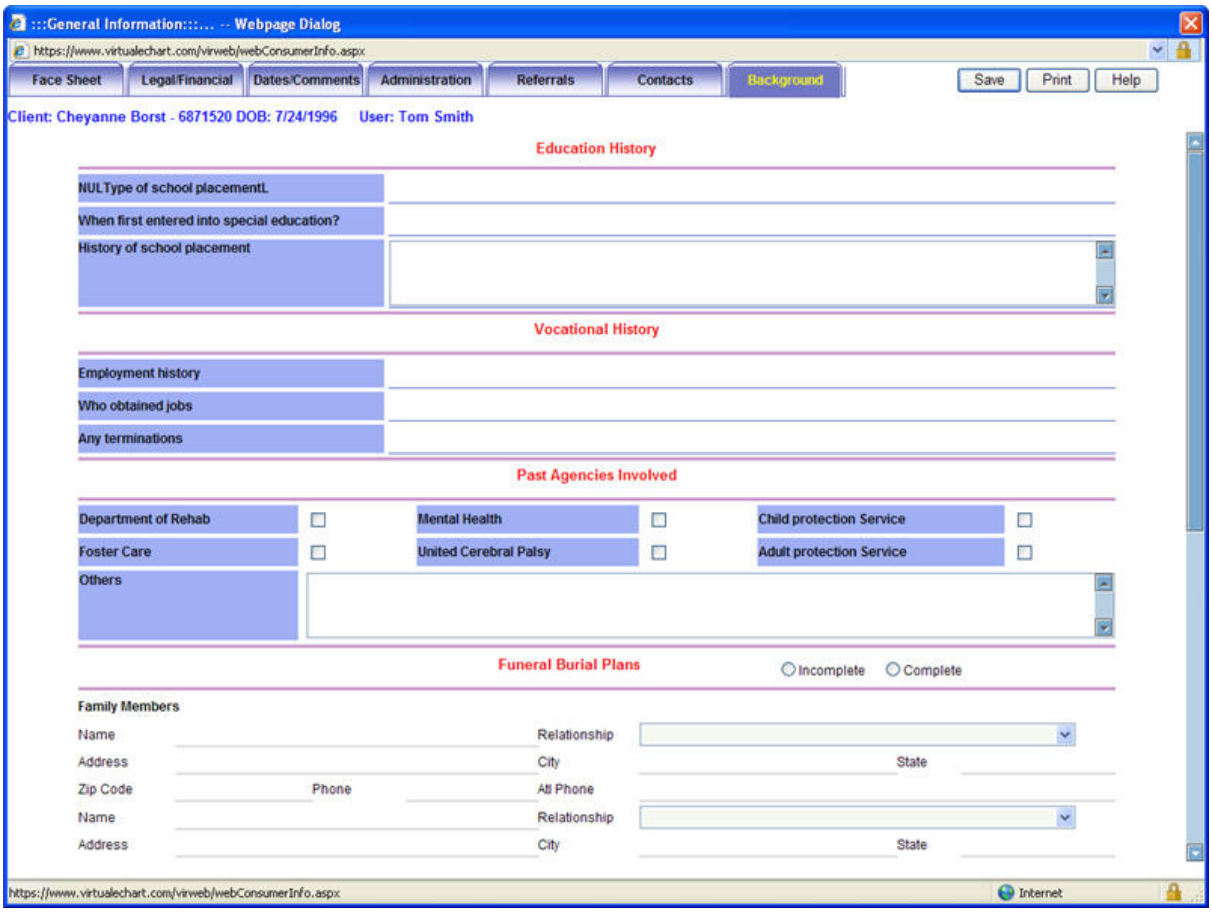

This tab is shown for reference only. The background tab fields are unique to each agency. Refer to your organization's specific documentation.

3.3 Case Notes

Case Notes in **eChart** are documentation records, describing client and/or case management activity. Case Notes are often referred to as transactions. Case Notes are usually entered by Service Coordinators, or in some cases automatically generated, in total or in part, by the system as a result of another process or function completed by the Service Coordinator. They serve as an audit trail and a variety of reports may be generated to chronicle or describe various activities and can be used as supporting documentation for other reports and forms. They are often a requirement of Federal and State funding agencies and also serve as an integral part of the funding process, for example, Title XIX of the Social Security Act. Typically, the majority of client data is located in the case notes, especially when a client has been in the system for a number of years. Because of its importance and inter-relationship to nearly all functions in **eChart**, and because most Service Coordinators will spend a great part of their time entering case note, you should learn every aspect of this function.

Case Notes List

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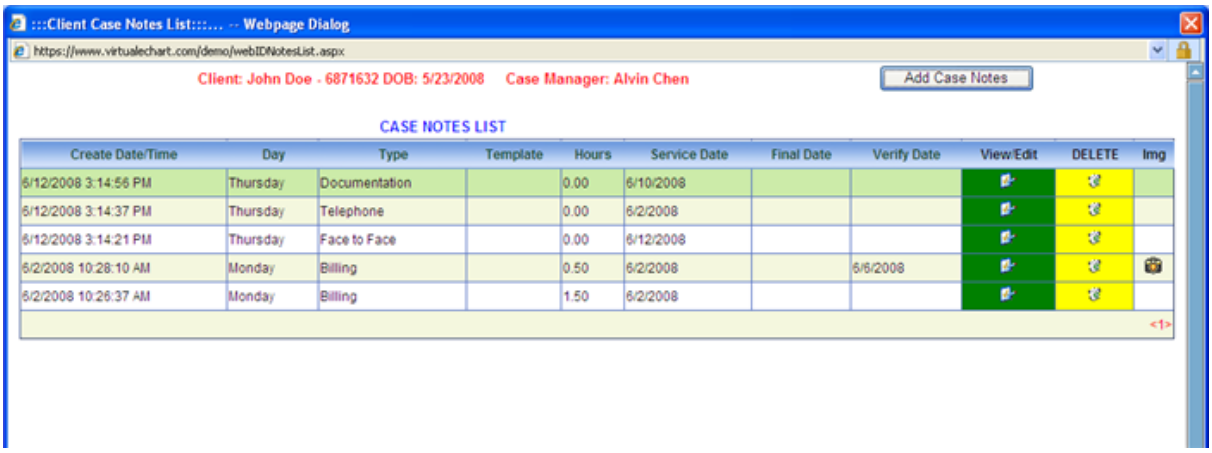

When you click the 'Case Notes' function on the main menu, a list of transactions will display as shown in the window above. You may either select an existing transaction by clicking on the 'View/Edit' icon in the row for the transaction you want or you can click the 'Add Case Notes' button to enter a new transaction. In either case, the transaction window below will be displayed.

Note that the Case Notes List window and the Case Notes window shown below are Pop-up windows. They are independent of the browser window from which they were initiated and when closed, will return to the prior window.

Case Notes Window

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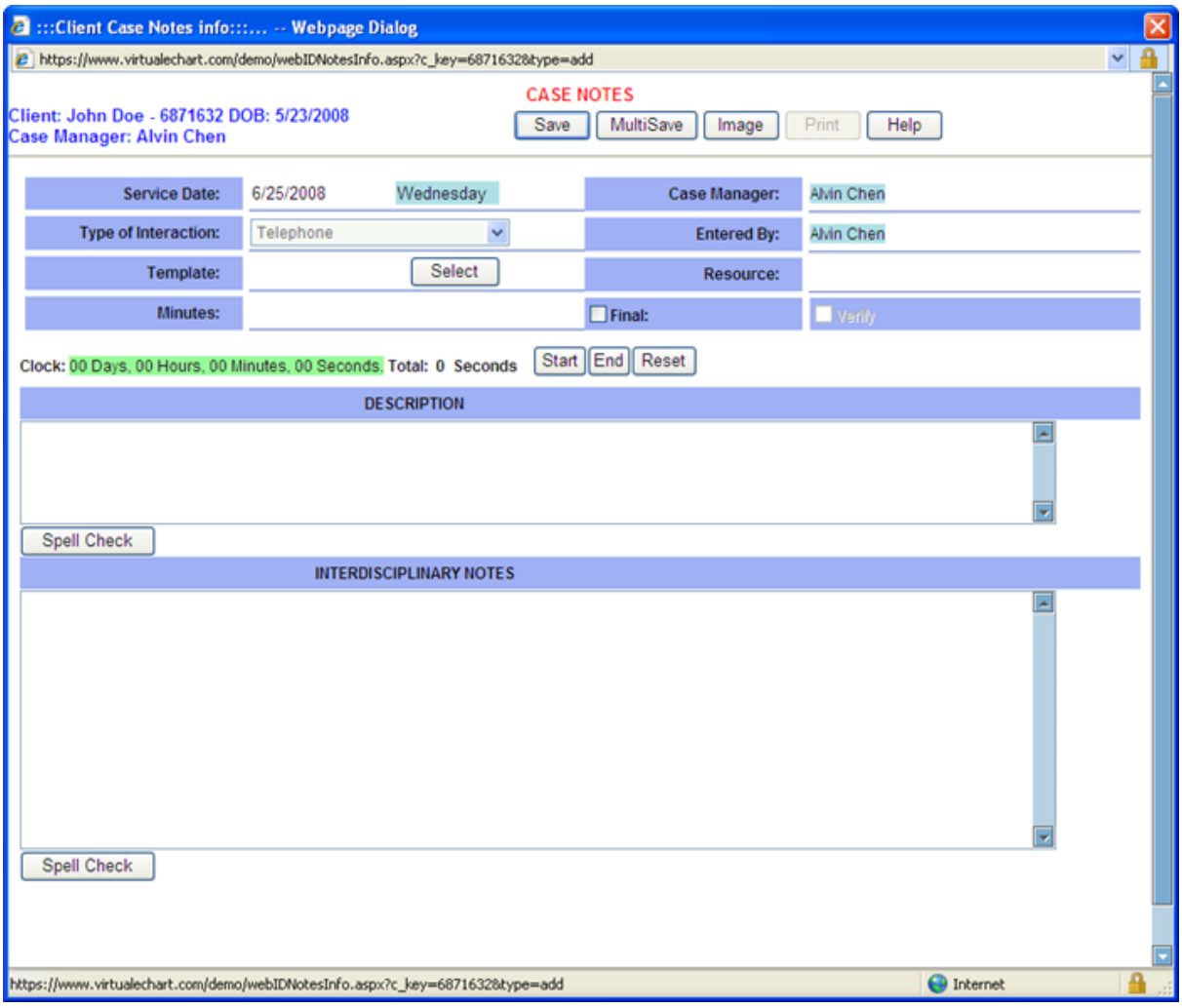

Case Notes Fields

There are several areas in the transaction data window. First, the title area contains the client's name, Client ID and Date of birth. Just below and to the right are the **Case Mgr**: (ID and name) and **Entered by:** (ID and name) fields, which are usually the same since the assigned Service Coordinator typically will enter most of the transactions for a client. In the case where an On-Call Service Coordinator enters a transaction, or when a client has been reassigned, they may be different. All of the fields described above are for reference only.

Note that the Type, Template and Description fields are interrelated. When you change the type, the template and description will change to the defaults, that is, the template will change to the default template specified in Settings and the description will change to that of the new template. When you change the template, the type may change to match the template's type and obviously, the description will change to match the template text.

Date

The first field is the Date of the transaction, or 'Service Date'. This is when the event took place, not when the transaction was entered. Normally you will change this date because in a new transaction, the date defaults to the current date and time on your computer. When you tab into or click on the Date, a drop down calendar will appear.

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Transaction Type
The 'Type of Interaction' field contains the transaction type. Click the type from the drop down list of valid types. There is a default type for new transactions which is defined in Setup. Note that the descriptions that follow represent a typical application but your organization may choose to categorize transactions into other types specific to their operation.

- **Telephone Type**
  Perhaps the most frequently used type is Telephone. Whenever you talk to the client or someone regarding the client, you should enter a telephone type transaction describing the conversation.

- **Documentation Type**
  Whenever you fill out a form or write a PCP/IPP or other client related documentation, you may enter a transaction describing the activity.

- **Face-To-Face Type**
  Whenever you have a meeting with the client, whether or not others are present, you enter a Face-to-Face transaction.

- **Collateral Type**
  If you have a meeting regarding a client and the client is not there, for example a meeting with the client's parents or a health care provider, you enter a transaction using Collateral as the type.

- **Planning/Discharge Type**
  Use this type to enter transactions for Intake or for clients leaving the system or facility.

- **Miscellaneous Type**
  As the name implies, Miscellaneous type transactions are used to describe various other activity that does not fall into one of the other categories.

Template
The template text is applied to the Description field. Templates are designed to save time and promote consistency.

Minutes
The Minutes field is the duration of the transaction event in minutes, not how long it took to enter the transaction.

Clock (Timer)
This is a timer that can increase accuracy, particularly when you make or receive a phone call. The timer is controlled by the 'Start', 'End' and 'Reset' buttons. Click on the 'Start' button to start the timer which will begin displaying the seconds, minutes and hours if applicable. Click the 'End' button to stop the timer. You can start and stop the timer in this manner any number of times and the system will continue to accumulate the total time. The 'Reset' button will set the timer to zero.

When you are about to make a call or get a call related to a client, enter Case Notes and start the timer. If it is convenient, you can fill in the Description and Case Notes fields while you are talking. When you are finished and hang up, make all necessary changes to the Description and Interdisciplinary Notes fields, then click the timer icon and it will stop timing the call with the elapsed minutes automatically entered.

Final
This is a check box and represents the status of the case note. When you check this field and save the transaction, you are validating that the transaction is complete. In effect, it indicates that you have signed off on the transaction and take responsibility for its accuracy. Once a transaction has been checked as final, it **cannot** be modified.

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Description Fields

The final area of the transaction data window consists of two text fields. As described in Functions and Processes, editing tools are available that facilitate the data entry processing. Most notably, Spellcheck and the standard editing tools on the task bar Edit menu or by using the control key combinations indicated on the menu.

Description

As noted above, when you select a template, the description is automatically filled in. You should think of the description field as a 'general' description of the event. That is, use general terms like mother or nurse instead of specific names like 'Mrs. Jones' or 'Ms. Johnson, R.N.' Use 'agency' or 'facility' instead of 'RCOC' or 'Good Shepherd'. And keep the description brief. It is more reference than a story.

Interdisciplinary Notes

Use the Interdisciplinary Notes field to expand on the description where specific details are needed. While the case notes may not always be required by the funding agencies, they are important as they provide a more complete audit trail of client activity and a better understanding of specific clientissues. Each organization will have their own requirements and guidelines for the use of these notes.

3.4 CDER

The Client Development Evaluation Report (CDER) is a major source of a client's diagnostic and evaluation data. Although the CDER was created for case management use in the Department of Developmental Services system in California, the information can be used generally by various social service organizations. Many of the fields are entered via drop down lists and the data in these lists are maintained by your organization. The CDER, therefore, can be customized to meet the specific needs of your organization. Its purpose is to facilitate the process of assessment and the acquisition of services and supports required by clients and when necessary, provide data for various reports.

Each client may have a CDER. Ideally, the CDER will be updated whenever there is a change in the client's data. The CDER has two tabs, each containing multiple sections of related fields. Both tabs have dozens of fields and must be scrolled to display or process them all. Shown below is the top of each tab. Each organization will have its own set of sections/fields that it maintains so we will describe the CDER in general terms and give brief descriptions of each section.

CDER Window - Diagnostic Element
Basic Information

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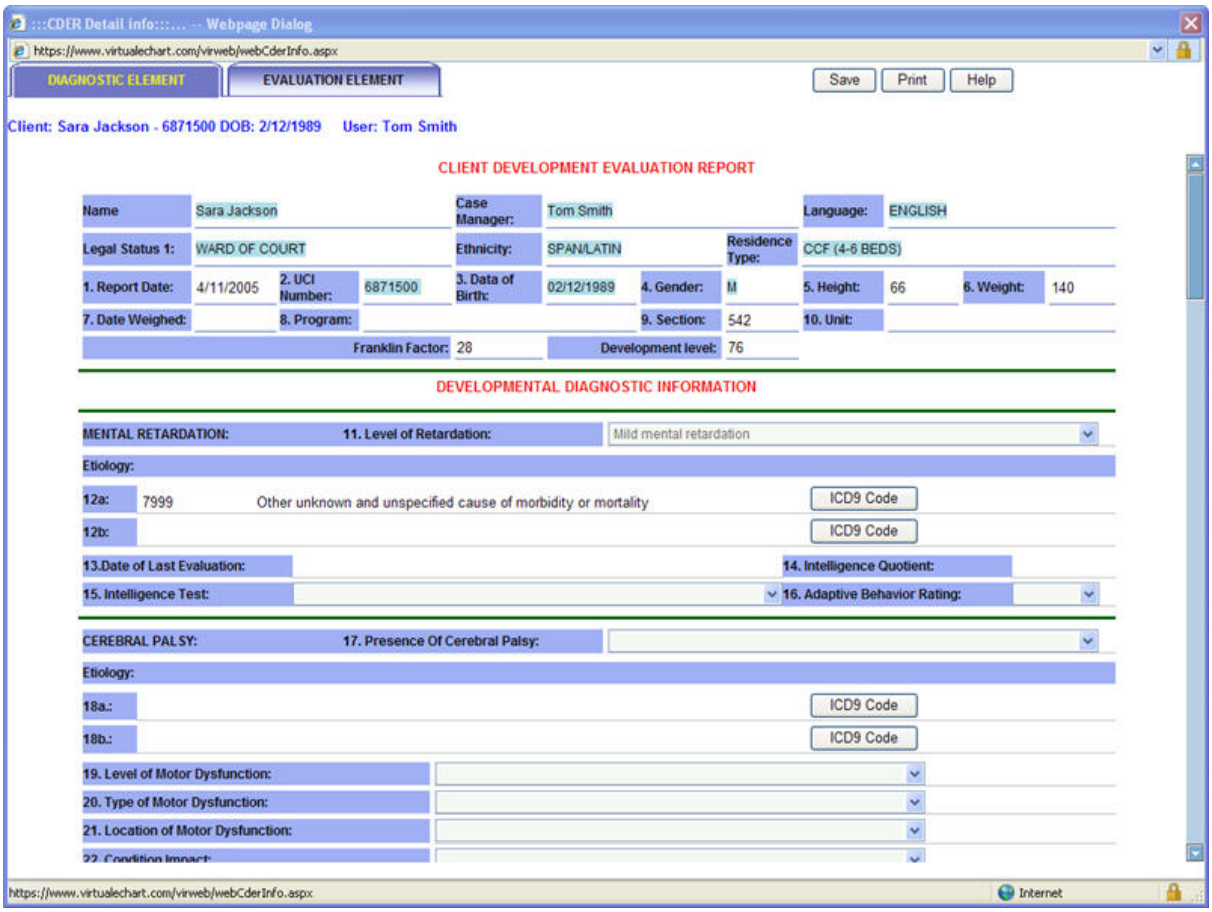

The first section of the Diagnostic Element contains basic demographic data and vital statistics, much of which is from the profile and cannot be changed on the CDER form. The other sections describe the factors and etiology (causes) of specific diagnoses. The etiology is presented as ICD-9 codes/descriptions in drop down lists.

The specific sections are as follows:

Diagnostic Element - Mental Retardation
Mental retardation describes significantly sub-average general intellectual functioning as demonstrated by general intelligence tests and impairment in adaptive behavior as determined by clinical assessment and standardized scales.

Diagnostic Element - Cerebral Palsy
Cerebral Palsy refers to a group of non-progressive lesions or disorders in the brain characterized by paralysis, spasticity or abnormal control of movement or posture.

Diagnostic Element - Autism
Autism is a syndrome characterized by extreme withdrawal, language disturbance, inability to form affective ties, frequent lack of responsiveness to other people, monotonously repetitive behaviors, inappropriate response to external stimuli, and an obsessive urge to maintain sameness.

Diagnostic Element - Epilepsy
Epilepsy is a disorder of the brain resulting in seizures.

Diagnostic Element - Other

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Other developmental disabilities which are similar or closely related to mental retardation or which require treatment and/or services similar to those required by the mentally retarded. For example, inter-cranial neoplasms, degenerative brain disease, spina bifida, etc.

Diagnostic Element - Risk Factors
These are risk factors or conditions associated with other disabilities.

Diagnostic Element - Mental Disorders
A clinically significant behavioral or psychological syndrome with painful symptoms, impairment of functioning or a failure of adjustment.

Diagnostic Element - Chronic Major Medical Conditions
These are major chronic medical problems that limit or impede a client or significantly impact the provision of service.

Diagnostic Element - Hearing
Measures the level of impairment, uncorrected and corrected if applicable.

Diagnostic Element - Vision
Measures the level of impairment, uncorrected and corrected if applicable.

Diagnostic Element - Behavior Modifying Drugs
Indicates whether or not particular drug types are being used by the client to control maladaptive behavior.

Diagnostic Element - Involuntary Movements
Five types of involuntary movement are indicated as present or not present.

Diagnostic Element - Special Health Care Requirements
Several fields are provided to specify special requirements. Each is confined to entries in a drop down list.

Diagnostic Element - Special Conditions or Behaviors
Several questions may be answered Yes or No to specific conditions or behaviors that may preclude or make difficult the placement of the client.

Diagnostic Element - Special Legal Conditions
Several questions may be answered Yes or No to special legal conditions pertaining to the client.

CDER Window - Evaluation Element

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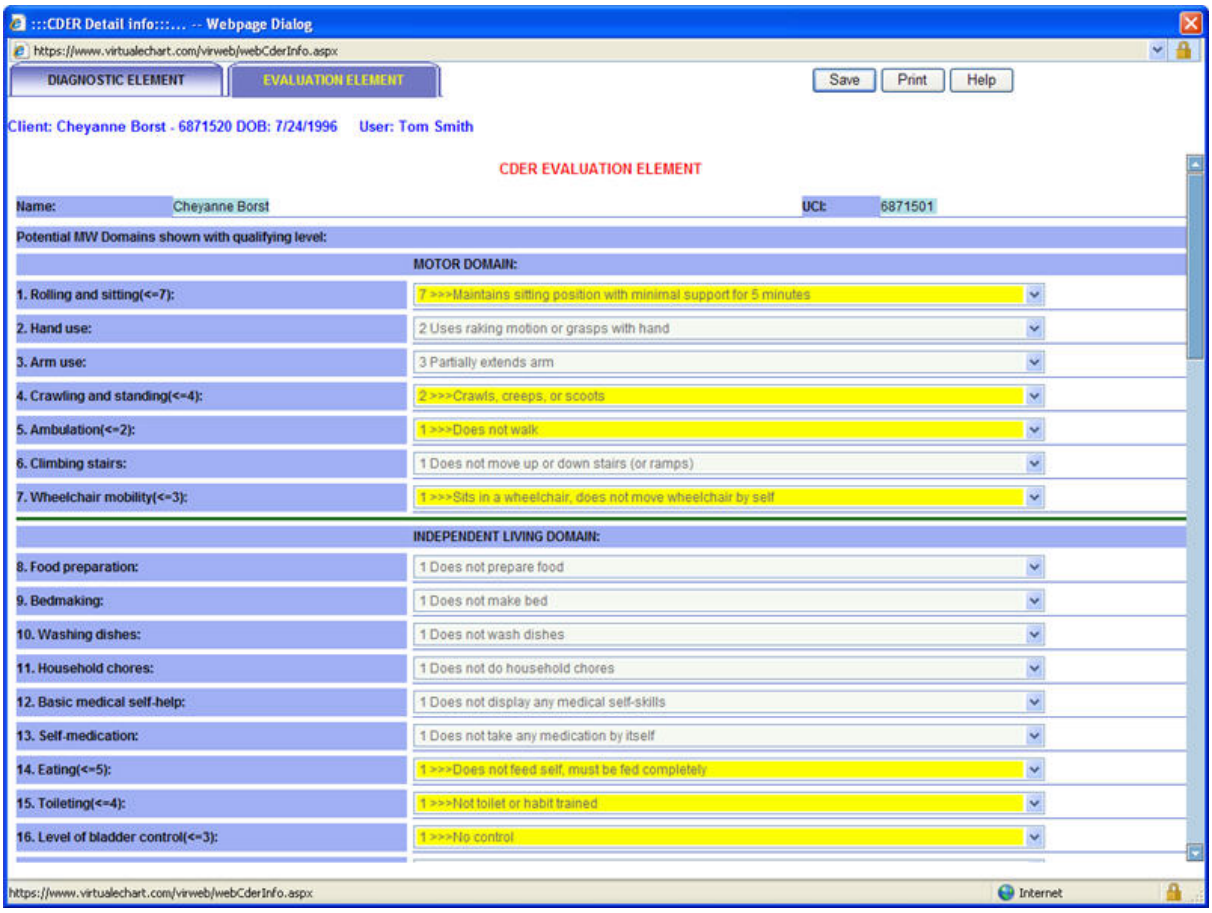
:::CDER Detail info::::... -- Webpage Dialog
https://www.virtualechart.com/virweb/webCderInfo.aspx
DIAGNOSTIC ELEMENT
EVALUATION ELEMENT
Save
Print
Help
Client: Cheyanne Borst - 6871520 DOB: 7/24/1996 User: Tom Smith
CDER EVALUATION ELEMENT
Name: Cheyanne Borst
UCI: 6871501
Potential MW Domains shown with qualifying level:
MOTOR DOMAIN:
1. Rolling and sitting(<=7): 7 >>>Maintains sitting position with minimal support for 5 minutes
2. Hand use: 2 Uses raking motion or grasps with hand
3. Arm use: 3 Partially extends arm
4. Crawling and standing(<=4): 2 >>>Crawls, creeps, or scoots
5. Ambulation(<=2): 1 >>>Does not walk
6. Climbing stairs: 1 Does not move up or down stairs (or ramps)
7. Wheelchair mobility(<=3): 1 >>>Sits in a wheelchair, does not move wheelchair by self
INDEPENDENT LIVING DOMAIN:
8. Food preparation: 1 Does not prepare food
9. Bedmaking: 1 Does not make bed
10. Washing dishes: 1 Does not wash dishes
11. Household chores: 1 Does not do household chores
12. Basic medical self-help: 1 Does not display any medical self-skills
13. Self-medication: 1 Does not take any medication by itself
14. Eating(<=5): 1 >>>Does not feed self, must be fed completely
15. Toileting(<=4): 1 >>>Not toilet or habit trained
16. Level of bladder control(<=3): 1 >>>No control
https://www.virtualechart.com/virweb/webCderInfo.aspx
Internet

The CDER Evaluation Element contains information used to measure and evaluate an individual's developmental growth. The Evaluation Element is divided into 6 areas or domains of development as follows:

Evaluation Element - Motor Domain
Measures the client's mobility.

Evaluation Element - Independent Living Domain
Measures the client's competency in caring for himself/herself.

Evaluation Element - Social Domain
Measures the extent to which the client interacts with others.

Evaluation Element - Emotional Domain
Measures the client's emotional state and how he/she reacts in different situations.

Evaluation Element - Cognitive Domain
Measures the client's perceptual and conceptual capabilities.

Evaluation Element - Communication Domain
Measures the client's ability to express and receive ideas by speech or nonverbal means.

NOTE: The highlighted (yellow) deficits indicate that the level qualifies the client, along with other criteria, for Medicaid Waiver.

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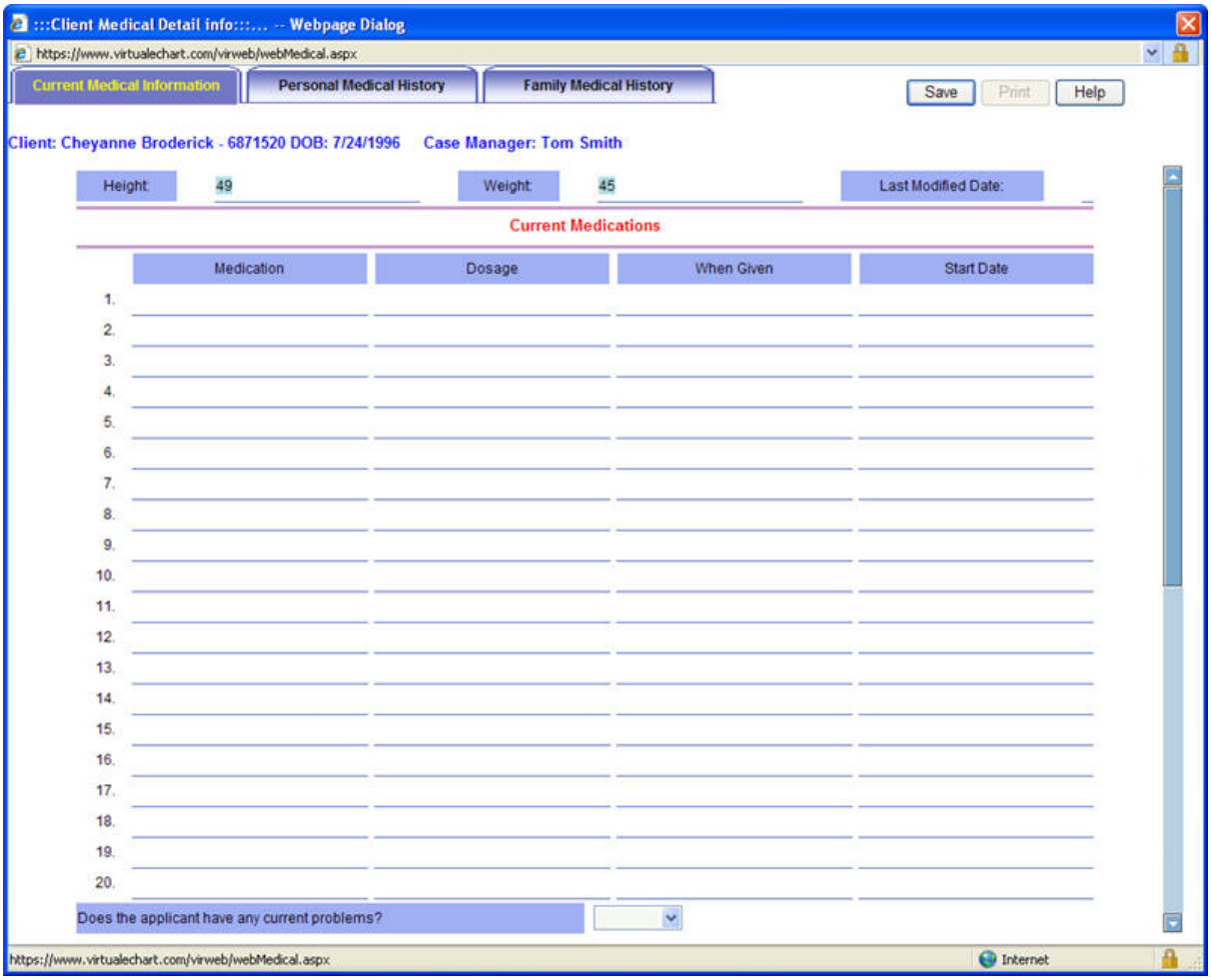
3.5 Medical

The medical page consists of multiple tabs of various medical information. This page contains relatively standard medical information but is often customized with agency specific information. You should review your agency's specific documentation regarding this data. The following three tabs are representative of the data maintained.

Medical Window - Current Information Tab



Medical Window - Personal History Tab

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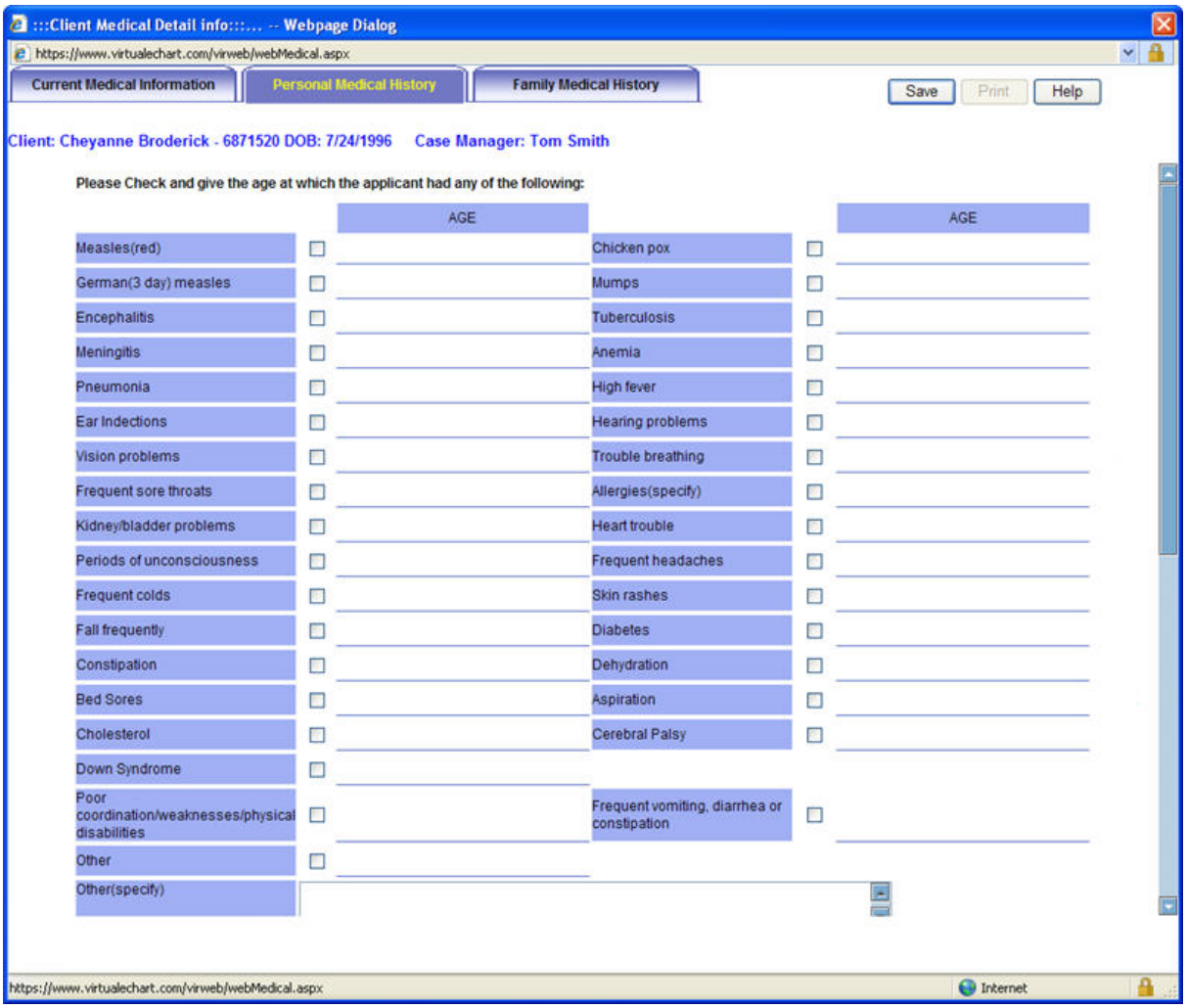

Medical Window - Family History Tab

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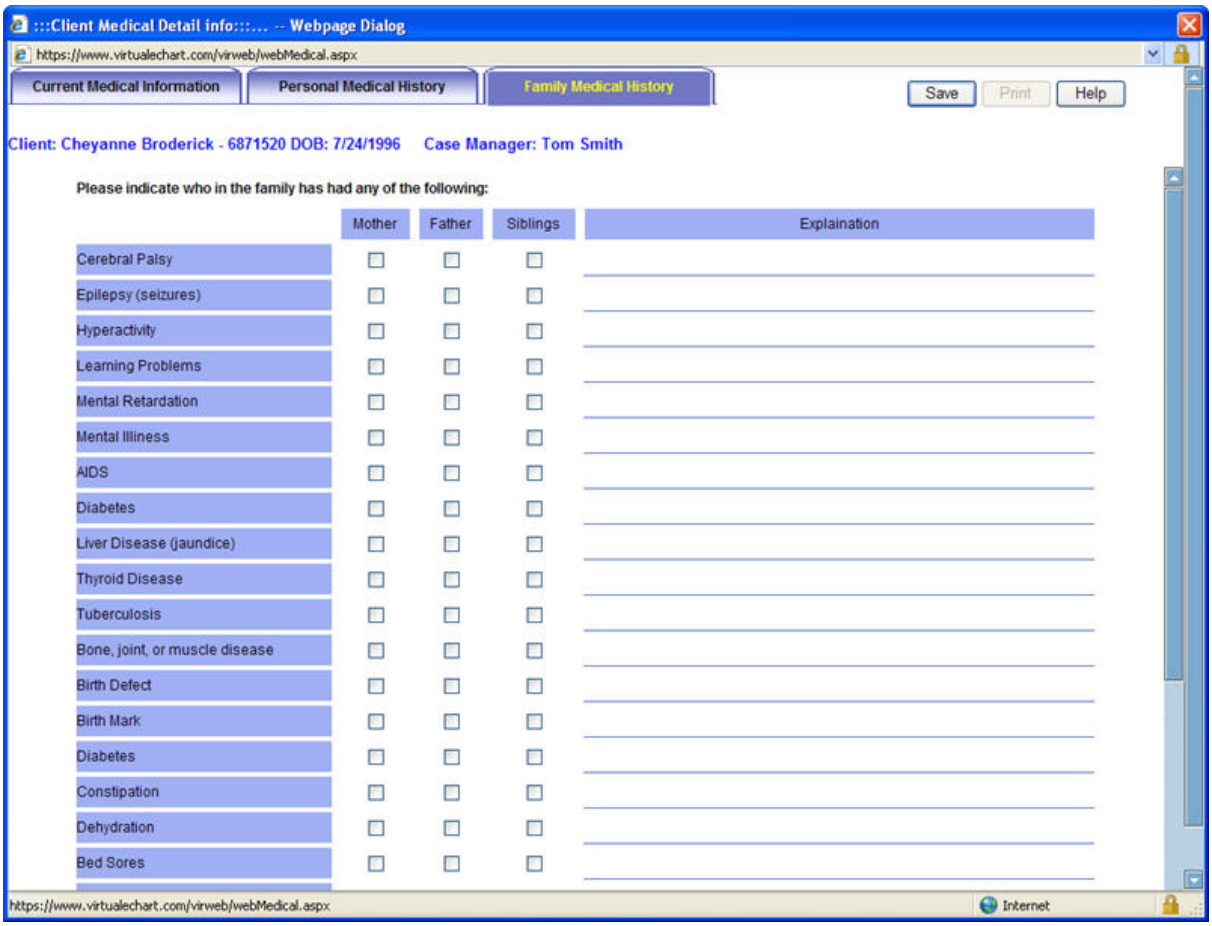

3.6 Resource

Similar to the client profile, the resource profile is the primary repository for resource information. There are six tabs on the profile. We will cover the most important aspects here as most fields are highly intuitive, if not obvious, such as 'Vendor Name:', 'Phone:', etc.

The processing of this data, other than for viewing, may be based on permissions. You should be familiar with your organization's policies in this area and if you are in doubt about your permission level, contact your system administrator or supervisor.

Resource Profile - Basic Information

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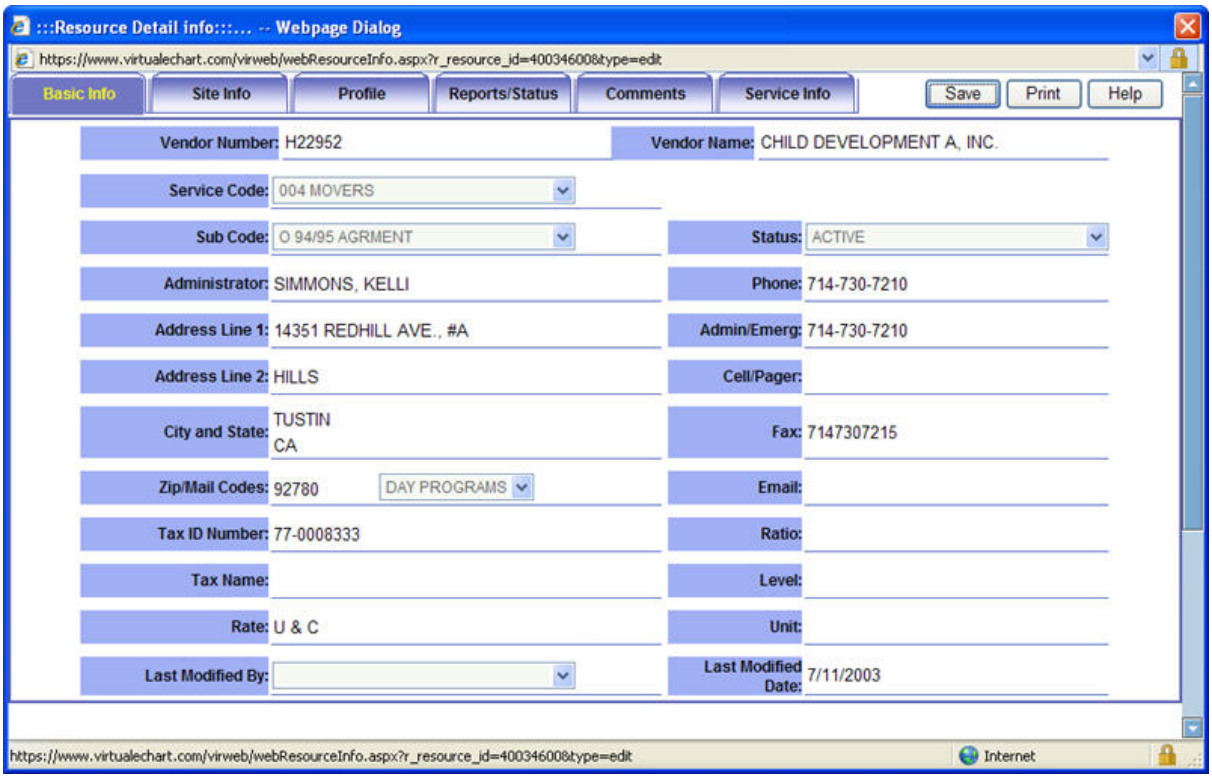

This is the basic resource information and most fields are intuitive or obvious as to their contents. Resource information is typically used in forms such as the POS or SIR and will usually be inserted into those forms via drop down list.

This Basic Information tab includes data, for example status, that will facilitate the entry of forms, for example, certain data, such as 'Status:' and 'Rate:' are important to the authorization process for POS forms.

Resource Profile - Site Information

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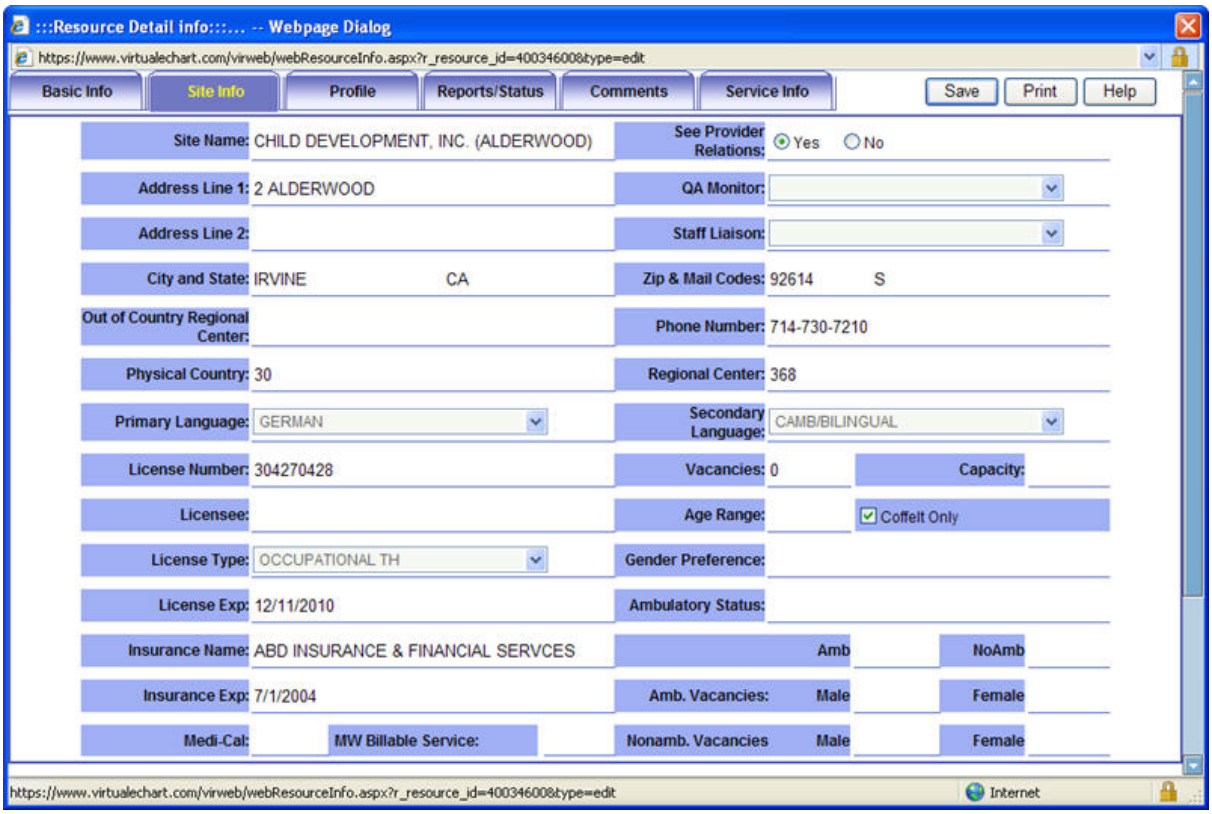

The Site Tab contains information specific to the actual facility. Where vendors have multiple sites, this is particularly helpful to differentiate between them.

Resource Profile - Profile

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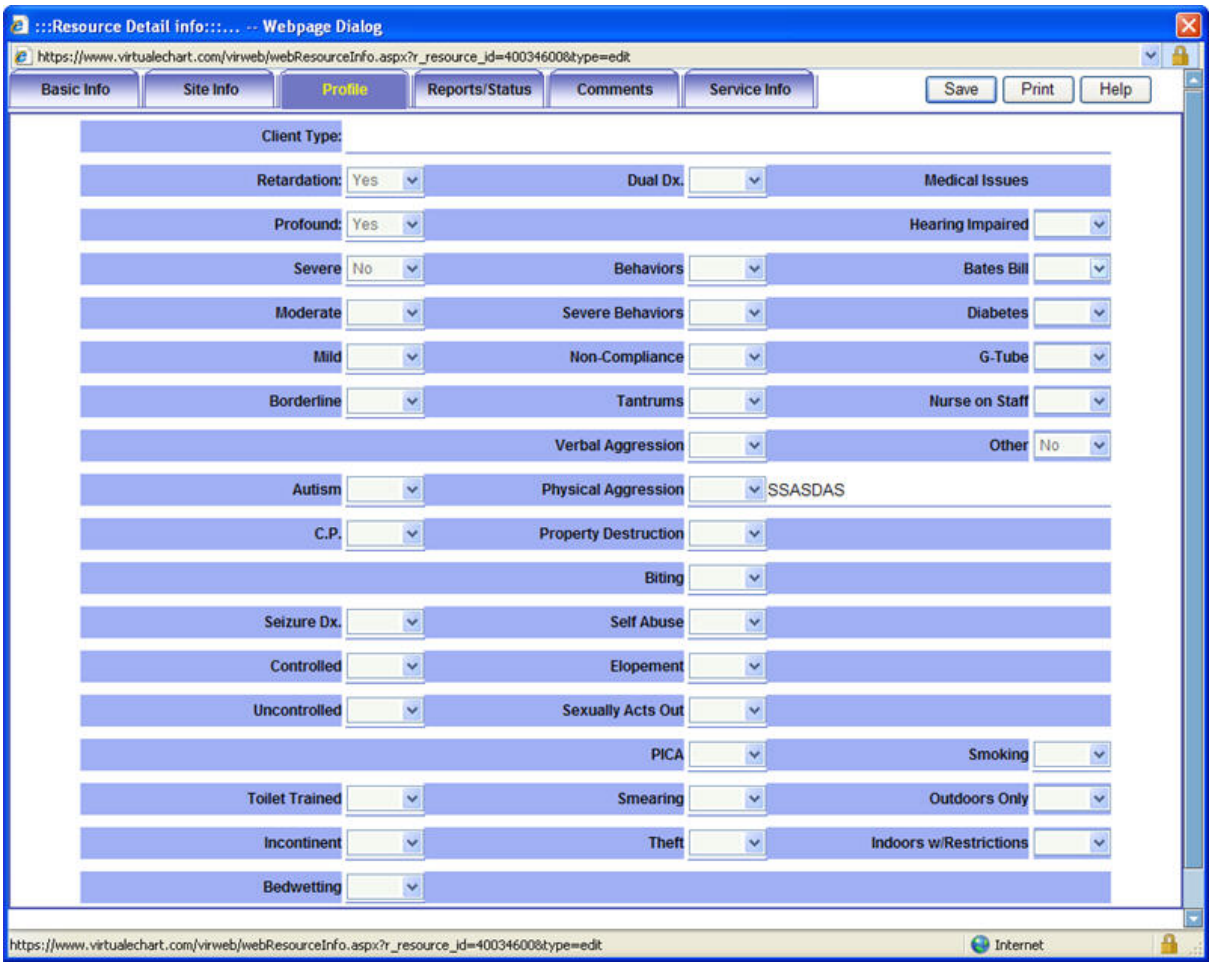

The Profile Tab contains information about the population the vendor serves. For example, the facility may accept clients who display aggressive behavior but may not accept those that smoke. In the process of placing clients in facilities, this information is vitally important.

Resource Profile - Reports/Status

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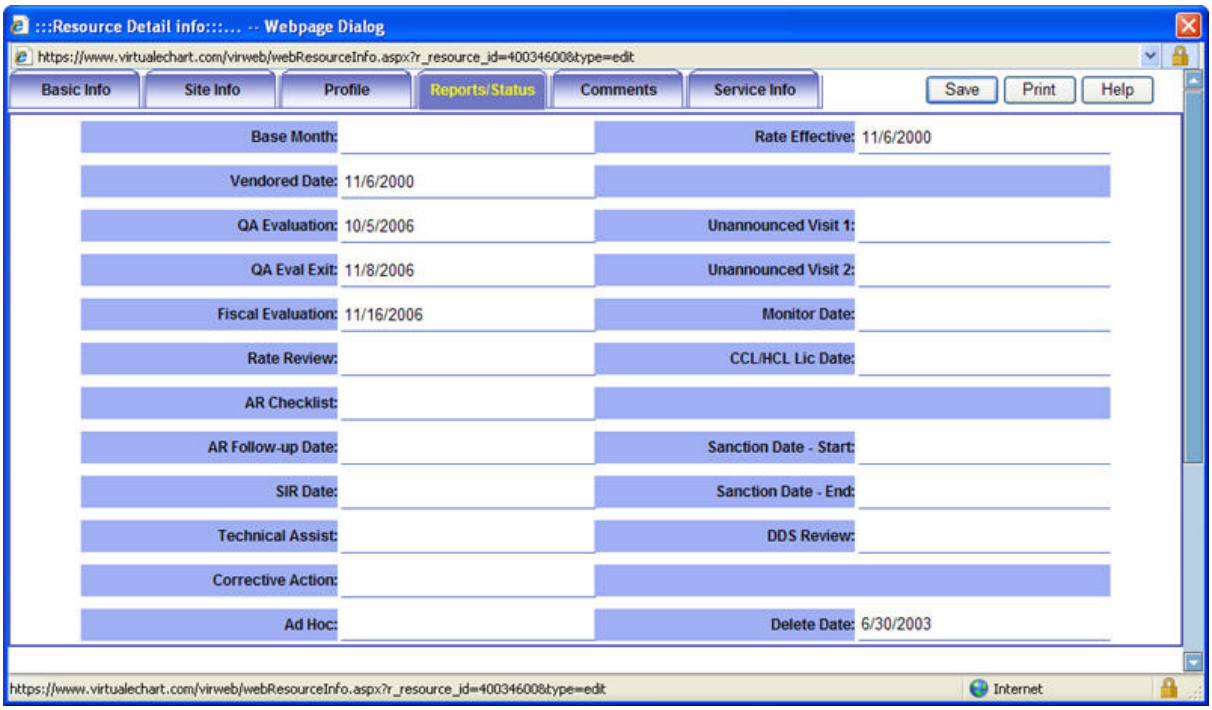
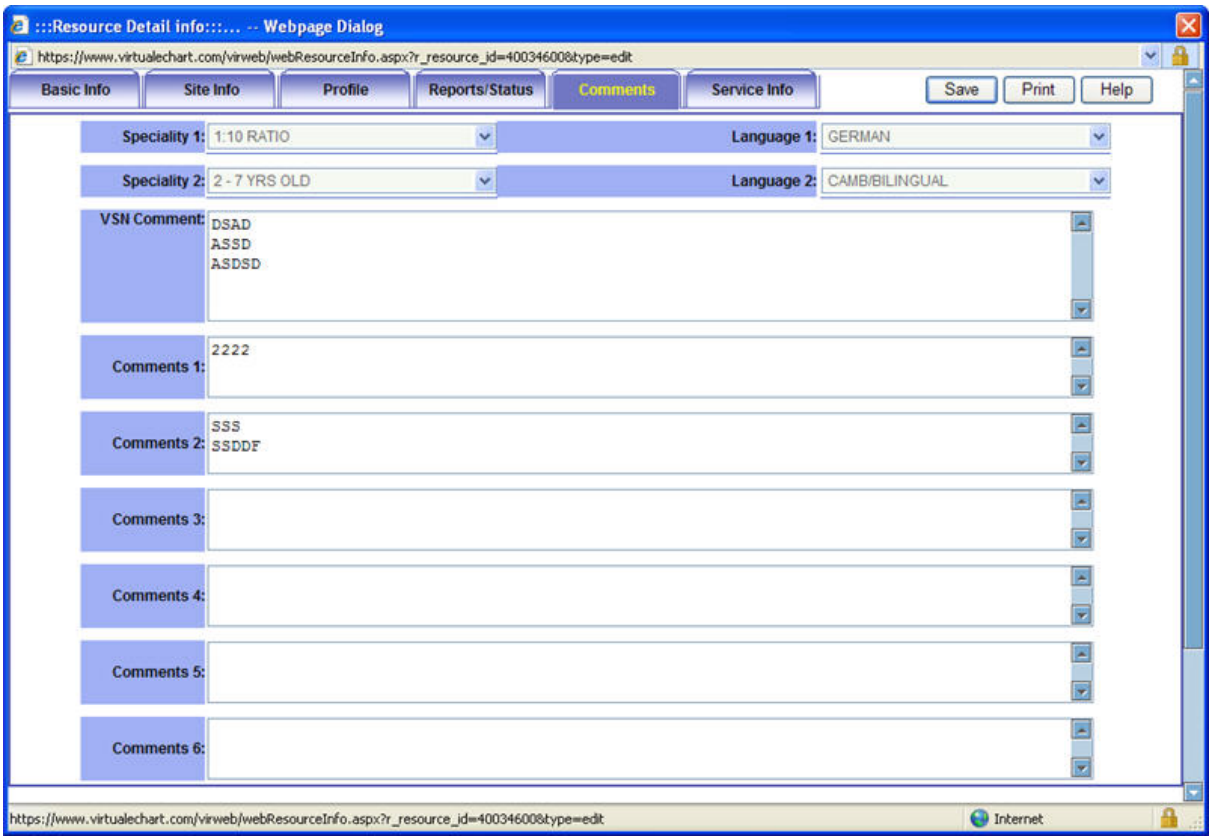


The Reports/Status Tab contains specific compliance dates and related information. These dates provide a valuable tool in evaluating and qualifying vendors.

Resource Profile - Comments



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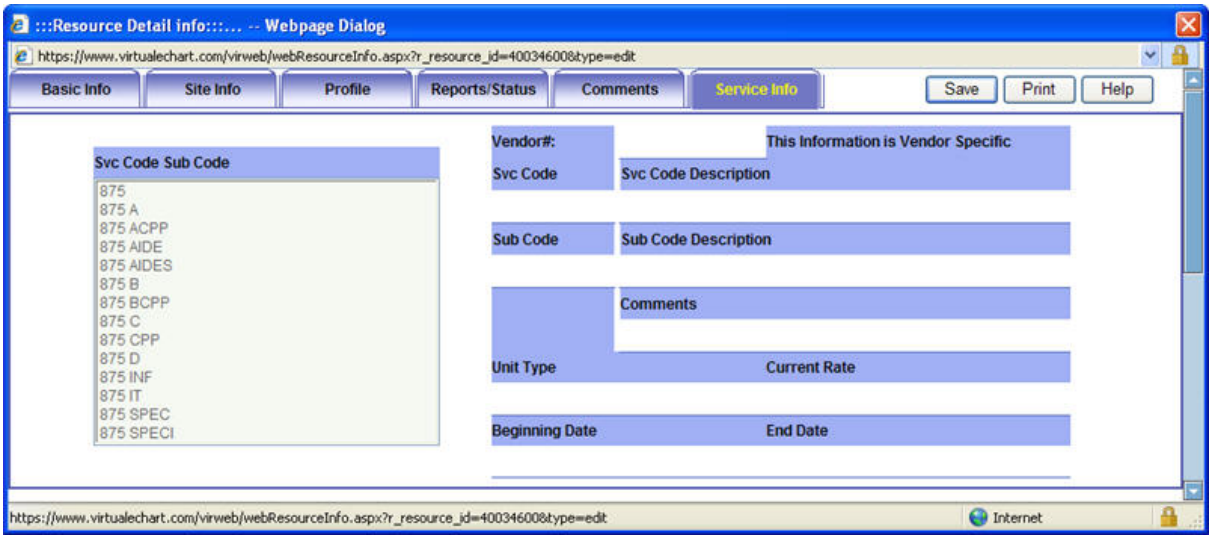
The Comments Tab provides a few informational fields and many free form text fields for note-worthy information. The data in the first four fields in the upper section of the tab are entered through drop down lists.

Resource Profile - Service Information



The final resource tab is the Service Info Tab which provides the service codes describing the services and supports provided by the vendor. All codes and their descriptions are from the ICD-9 table.

3.7 Tickler

The Tickler function is not only a reminder system, as the name implies, but also provides for a level of oversight to guage compliance. Compliance refers to the timeliness of certain forms and reports which have due dates.

Tickler Window

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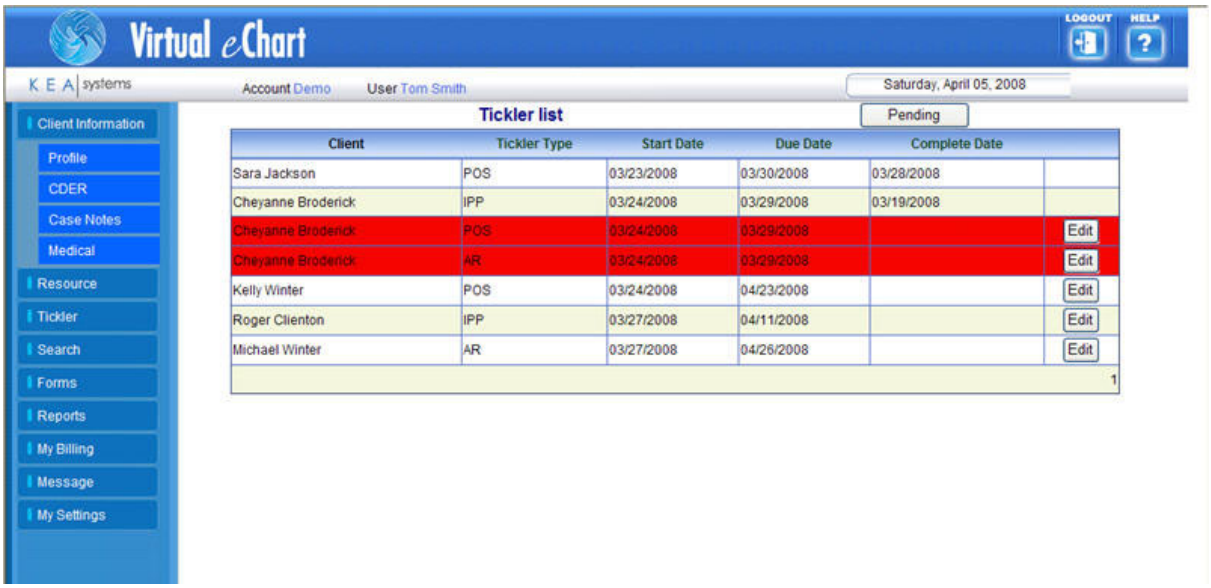
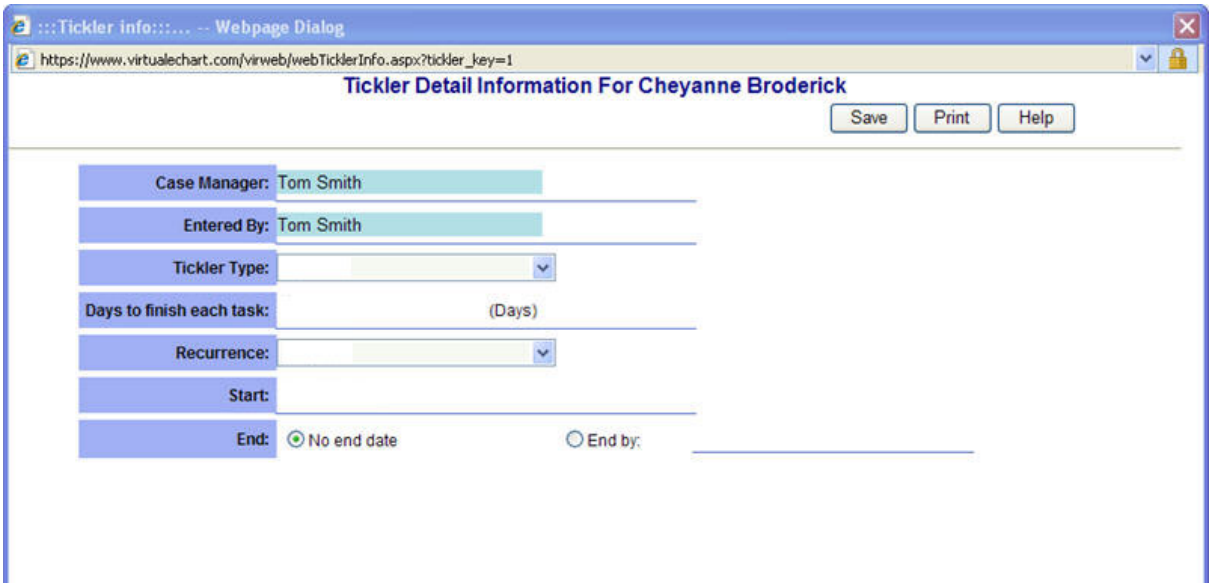


The Tickler reminds a Service Coordinator of tasks and provides for planning, compliance and visual status. Service Coordinators are responsible for a number of reports which are due at varying frequencies and for a number of tasks that must be completed in a timely manner. They are typically relatd to a client but can be used for any reminder desired. Each entry in the Tickler represents a task due by a specified date. Tickler items can be recurring at a specified frequency.

Which items are entered into the Tickler and their frequency are specific to each agency. You should review your agency's policy regarding requirements and compliance issues and keep the tickler up to date and accurate. It can be a valuable tool in the conduct of case management. Note that the Tickler List on the Main Menu is not client specific; rather, it contains items for your entire case load. Whereas the Tickler List displayed from the Client Profile shows only the items related to the current client.

When you enter a new item, the following page is displayed.



The 'Case Manager:' and 'Entered By': fields are prefilled as indicated by the light blue background.

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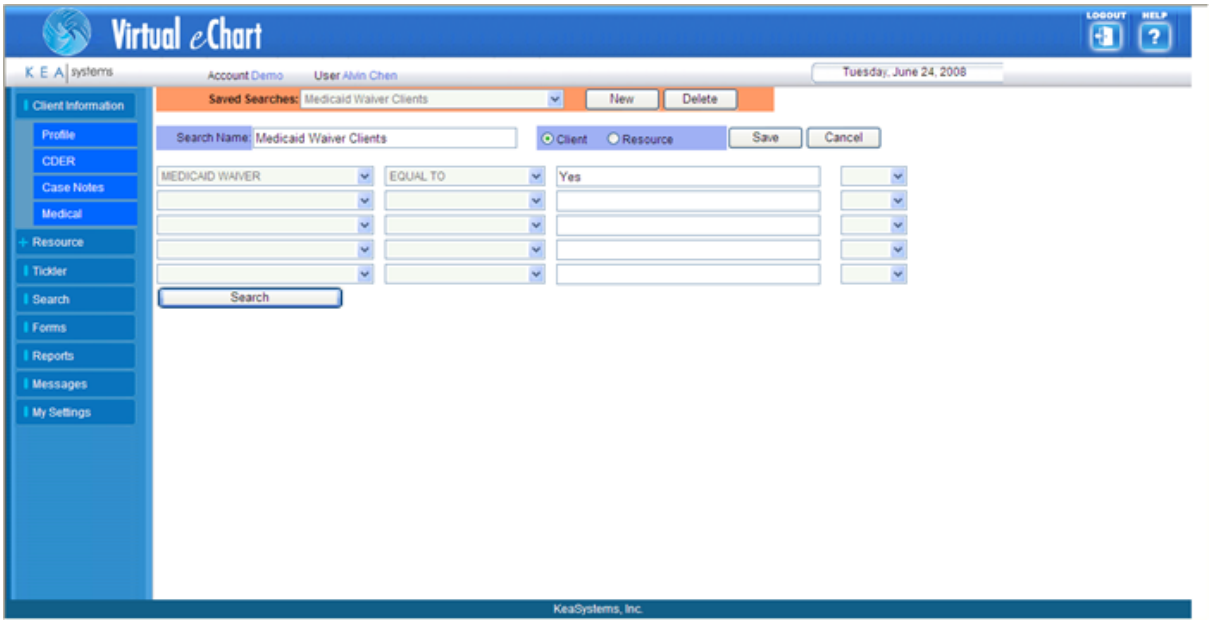
The 'Tickler Type:' and 'Recurrence:' fields are drop downs and the data is specific to your agency. The 'Start:' and 'End by:' dates use a drop down calendar for entry. 'Days to finish each task:' and 'Comments:' are the only two fields that you can enter text into.

3.8 Search

The search function will find a client or resource based on parameters you enter. For example, a client calls for assistance but he cannot remember his Client ID or even his last name, however, he can tell you his first name and birth date. You can search on these bits of information to get to his data. You could also use search to produce a list of all clients who are under 3 years of age or those that live in a certain residential facility.

Search Window



The search window has three areas: (1) the saved search area, including the current search name, and whether the search is for clients or resources; (2) basic search parameters; and (3) the search results which replaces the other two areas and is displayed when the search is complete.

Saving Searches

If you conduct a search frequently, rather than re-keying the various parameters, you can give the search a name and save it. When you need it, you can select it from the 'Saved Searches:' drop down list. To enter a new search, click the 'New' button and enter all the parameters or select a similar saved search and modify it. Then give the search a name and click the save button.

Search Parameters - Search Fields

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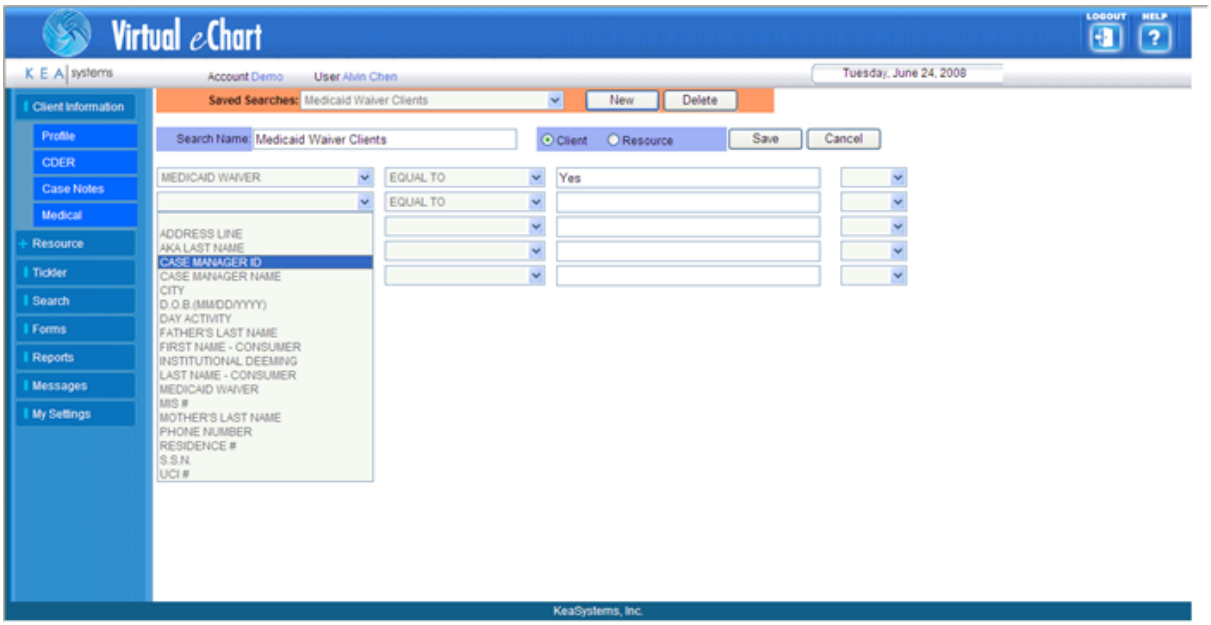
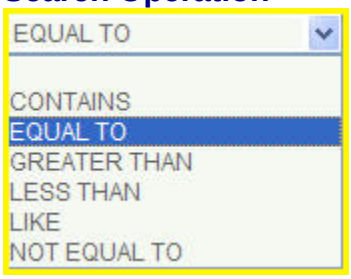


The first colum is the field to be searched. Selection is made from a drop down list. This drop down list changes when you select client or resource in the saved search area, therefore, you must select client or resource before entering the parameters.

Search Operation



The second column contains the operations or search criteria which is also selected from a drop down list. The following describes the search operations:

CONTAINS: Specifies that the selected field contains the characters in 'Search For' column described below.

EQUAL TO: Specifies that the selected field is equal to the characters found in the 'Search For' column.

GEATER THAN: Specifies that the selected field is greater than the value in the 'Search For' column.

LESS THAN: Specifies that the selected field is less than the value in the 'Search For' column.

LIKE: This is the most complex operation. The operation is similar to the 'CONTAINS' criteria if you add a wild card to the 'Search For' value. The wild card is the percent sign (%) which stands for any character or characters. For example, 'smith%' indicates that the 'Search For' field should contain 'smith' and any number of following characters. For example, the names Smithy and Smithsonian and Smithe would all satisfy the search.

NOT EQUAL TO: This is the opposite of 'EQUAL TO:' described above.

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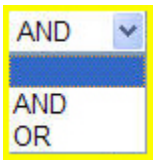
Search For

The third field is the 'Search For' field and contains the data to be searched for according to the search operation. This is a free form text field and the search is not case sensitive. You may enter 'Y' or 'y' in our sample search and find the same client(s).

NOTE: The data in fields that are 'Yes/No' drop down fields actually contain 'Y' or 'N' but display 'Yes' or 'No'. Because of this, you must enter either 'Y' or 'N' in the Search For field or Search will not find the client(s).

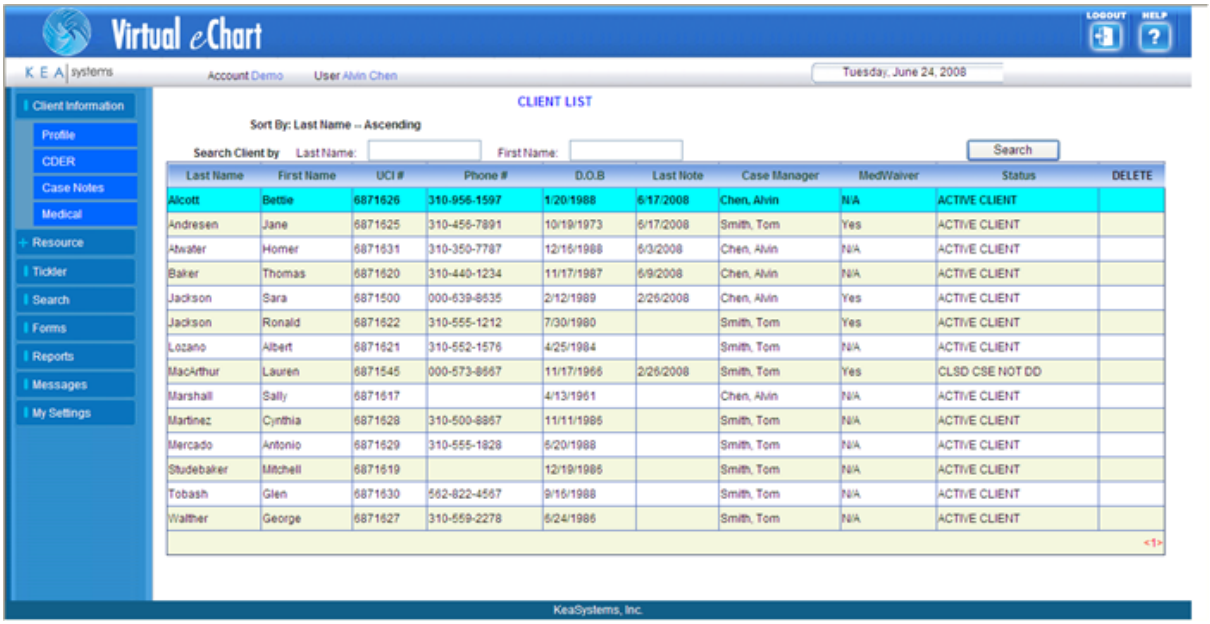
Connectors



Each search operation consists of the above three required fields (although the 'Search For' field may be blank). If there are multiple parameter sets, a connector is entered in the fourth field of the row and the next parameter set entered. The connector is either 'and' or 'or'. The use of these connectors is obvious but can get complicated if you have many rows. You should consider the use of these connectors and simplify searches as much as possible to minimize unexpected or seemingly erroneous results. In essence, the search will satisfy each parameter set before going on to the next. When a search parameter set fails, the search will go on to the next client/resource and start with the first parameter set again.

Once all parameters have been entered, click on the search button. When the search is completed, all records satisfying the search parameters are displayed in the lower data window. If no records are found, a message will display indicating this.

Search Results


Virtual eChart
LOGOUT
HELP
K E A systems
Account Demo
User Alvin Chen
Tuesday, June 24, 2008
Client Information
Profile
CDER
Case Notes
Medical
Resource
Tickler
Search
Forms
Reports
Messages
My Settings
CLIENT LIST
Sort By: Last Name -- Ascending
Search Client by
Last Name:
First Name:
Search
Last Name
First Name
UCI #
Phone #
D.O.B
Last Note
Case Manager
MedWaiver
Status
DELETE
Alcott Bettie 6871626 310-956-1597 1/20/1988 6/17/2008 Chen, Alvin N/A ACTIVE CLIENT
Andresen Jane 6871625 310-456-7891 10/19/1973 6/17/2008 Smith, Tom Yes ACTIVE CLIENT
Atwater Homer 6871631 310-350-7787 12/16/1988 6/3/2008 Chen, Alvin N/A ACTIVE CLIENT
Baker Thomas 6871620 310-440-1234 11/17/1987 6/9/2008 Chen, Alvin N/A ACTIVE CLIENT
Jackson Sara 6871500 000-639-8635 2/12/1989 2/26/2008 Chen, Alvin Yes ACTIVE CLIENT
Jackson Ronald 6871622 310-555-1212 7/30/1980 Smith, Tom Yes ACTIVE CLIENT
Lozano Albert 6871621 310-552-1576 4/25/1984 Smith, Tom N/A ACTIVE CLIENT
MacArthur Lauren 6871545 000-573-8667 11/17/1966 2/26/2008 Smith, Tom Yes CLSD CSE NOT DD
Marshall Sally 6871617 4/13/1961 Chen, Alvin N/A ACTIVE CLIENT
Martinez Cynthia 6871628 310-500-8867 11/11/1985 Smith, Tom N/A ACTIVE CLIENT
Mercado Antonio 6871629 310-555-1828 5/20/1988 Smith, Tom N/A ACTIVE CLIENT
Studebaker Mitchell 6871619 12/19/1985 Smith, Tom N/A ACTIVE CLIENT
Tobash Glen 6871630 562-822-4567 9/16/1988 Smith, Tom N/A ACTIVE CLIENT
Walther George 6871627 310-559-2278 6/24/1986 Smith, Tom N/A ACTIVE CLIENT
<1>
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As you can see, the search results window looks very much like the client (or resource) list window but contains only those clients (or resources) that are found by the search. In fact, it operates the same way. You can select a client to make it the current client and then proceed to other functions, for example, you could click the General Info' or 'Case Notes' function. Note that the first clientlisted

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is highlighted and is by default the current client.

Search is one of the most useful tools in **eChart** and you should conduct several searches, testing various parameters and evaluating the results so that you are familiar with its operation.

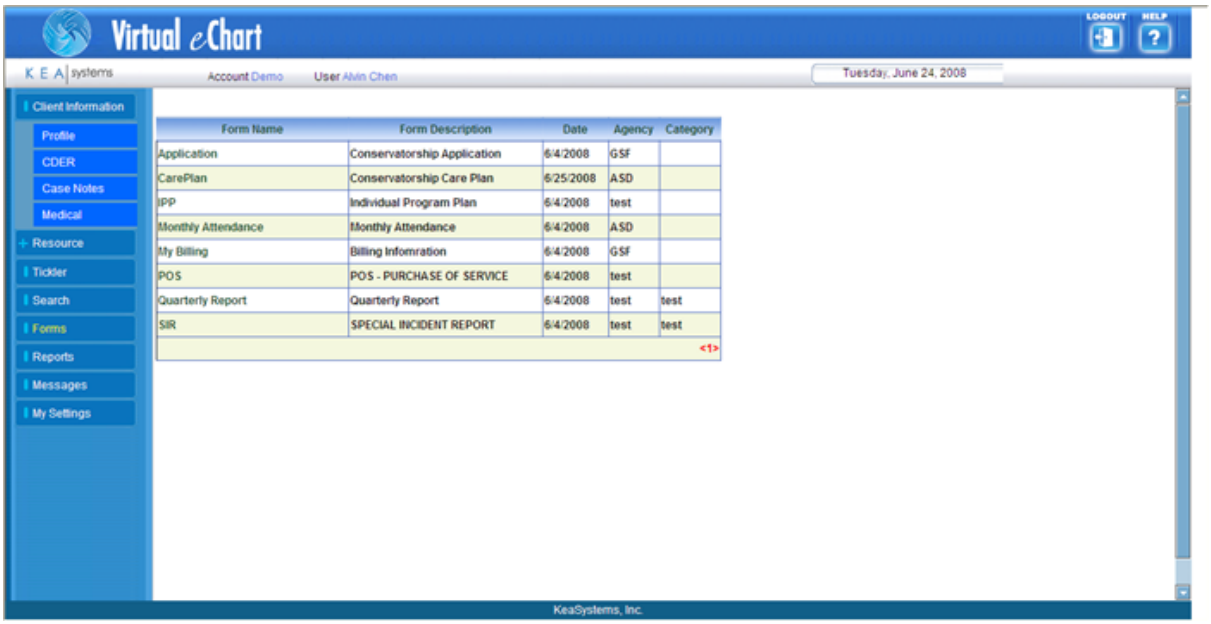
3.9 Forms

3.9.1 Forms Processing

When you select Forms from the main menu, a list of the available forms will display. The forms that appear are limited to the forms that have been activated at your organization and may be further limited by your permission level.

All forms are created and maintained in a forms library, available to all **eChart** user organizations. Your system administrator will select those forms to be used by your organization from this common library, and add them to your organization's list. The entire library of forms is only available to your system administrator or other authorized persons.

Client Forms Window



This list represents the available forms for your agency and your permission level. Some forms are client specific and others are generally for all/any client. To access a form for clients, insure that your have selected a client on the main window and that client is the current client, before your click the `Forms' button on the main menu.

Forms typically differ between organizations and the list itself will be quite different. Some forms require very little interaction and few fields of data to enter while others require considerable data entry. Because of the many differences, forms are described in separate documentation specific to your organization. Your organization may in fact publish its own help documentation on forms. However, because of the importance and universality of some forms, we discuss them here in general terms.

Plans

There are many, many different kinds of plans. Most typically, plans are written and maintained as a

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guide to provide services and supports to clients in social service programs and can assist in producing positive outcomes and build individual capacities and capabilities. Plans are typically required by funding organizations, and therefore your own organization, and must be produced or modified periodically as conditions change. Because there are so many kinds of plans and variations, we will discuss a very standard form in general terms here to illustrate the use of the forms processor in **eChart**.

In California, the Lanterman Act requires that an Individual Program Plan (IPP) be written and maintained in the conduct of case management within the Department of Developmental Services. Amendments to the Act require a person-centered approach to that document. The person-centered approach relies much less on the service system by organizing truly individualized, natural, and creative supports to achieve meaningful goals based on the individual's strengths and preferences. The resulting form is the Person Centered Plan. It is produced by the Service Coordinator working with and taking input and direction from the client and his/her family or significant others. A PCP meeting must take place at least once in every three years. Your organization may have a more frequent requirement and once a year is perhaps more common for regional centers. This meeting, while it may be initiated and arranged by the Service Coordinator is the client's meeting. The client may request a meeting at other than the normally scheduled time and that meeting must be held within 30 days of the request. The meeting is between the Service Coordinator, client and his/her family or any other persons invited by the client such as a health care professional.

As a result of the meeting, a PCP is produced by the Service Coordinator. Again, the client participates in the creation of the PCP and may ask for specific services and supports. Person-centered planning is an approach to determining, planning for and working toward the preferred future of a person with developmental disabilities and his/her family. The preferred future is what the person and family want to do in the future based on their strengths, capabilities, preferences, lifestyle and cultural background. Person-centered planning is a framework for planning and making decisions. It is not a collection of methods or procedures. Person-centered planning is based on an awareness of, and sensitivity to, the lifestyle and cultural background of the client and family.

Much of the data in the PCP is derived from the profile and CDER. While this insures the data is matched between those forms, it does not insure that the data is current and/or accurate. In the creation of this form, the Service Coordinator must insure that the CDER and profile are current and accurate. The timely fulfillment of the meetings and creation of the form is facilitated by the Tickler function.

Purchase of Service Request

The Purchase of Service Request (POS) is created to request services and supports for clients. When a POS is authorized and the service or support acquired, it becomes an Authorized Purchase of Service (Auth). Depending on your agency's policies, both Requests and Auths may be shown in the list.
POS requests are typically completed by the Service Coordinator and are then reviewed and authorized. The review process may involve a review team or a single individual, manager or supervisor.

Special Incident Report (SIR)

Special Incident Reports must be produced to document the occurrence of any incident as defined by your organization and/or funding agencies. Both social service organizations and Vendors are required to report. Users of **eChart** should be familiar with the requirements and the many incidents which apply. At many organizations, creating the SIR form is the responsibility of authorized staff. However, as the assigned Service Coordinator of a client involved in a special incident, you must also participate in the SIR process which involves several steps. SIR processing may use messaging (email) to communicate with and notify various persons involved in SIR processing.

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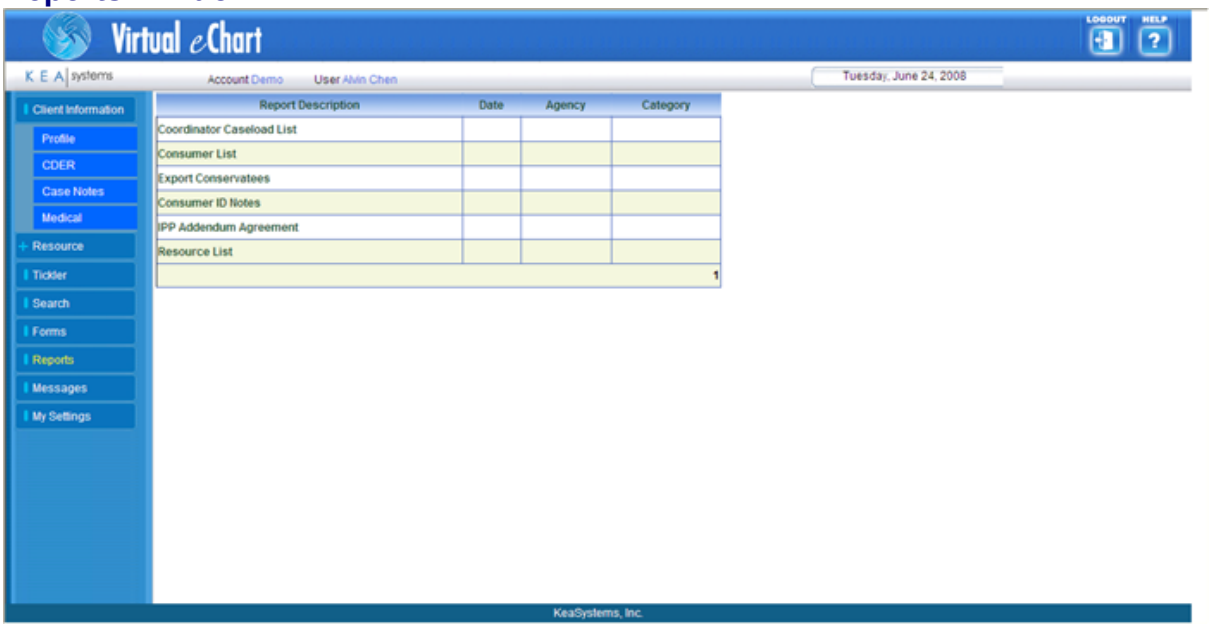
3.10 Reports

The Reports function provides you with a way to compile, condense and categorize the data in **eChart** . It is then presented to you in an informative and intuitive format on the screen or on the printer. You should think of it as a tool to assist you in your case management duties. The report processor is a third party software program - *'Crystal Reports'*. The Reports function is similar to forms in that a common library of reports is maintained and available to all user organizations for inclusion in their particular list. Like forms, the reports may also be customized to meet your organization's needs. Reports may also be created by your organization and added to the library if the *Crystal Reports* report writer is acquired and your organization has a person(s) that can write the reports.

Reports Window



When a report is selected, 'Crystal Reports' is called to output the report. As in the example below, further information may be required.

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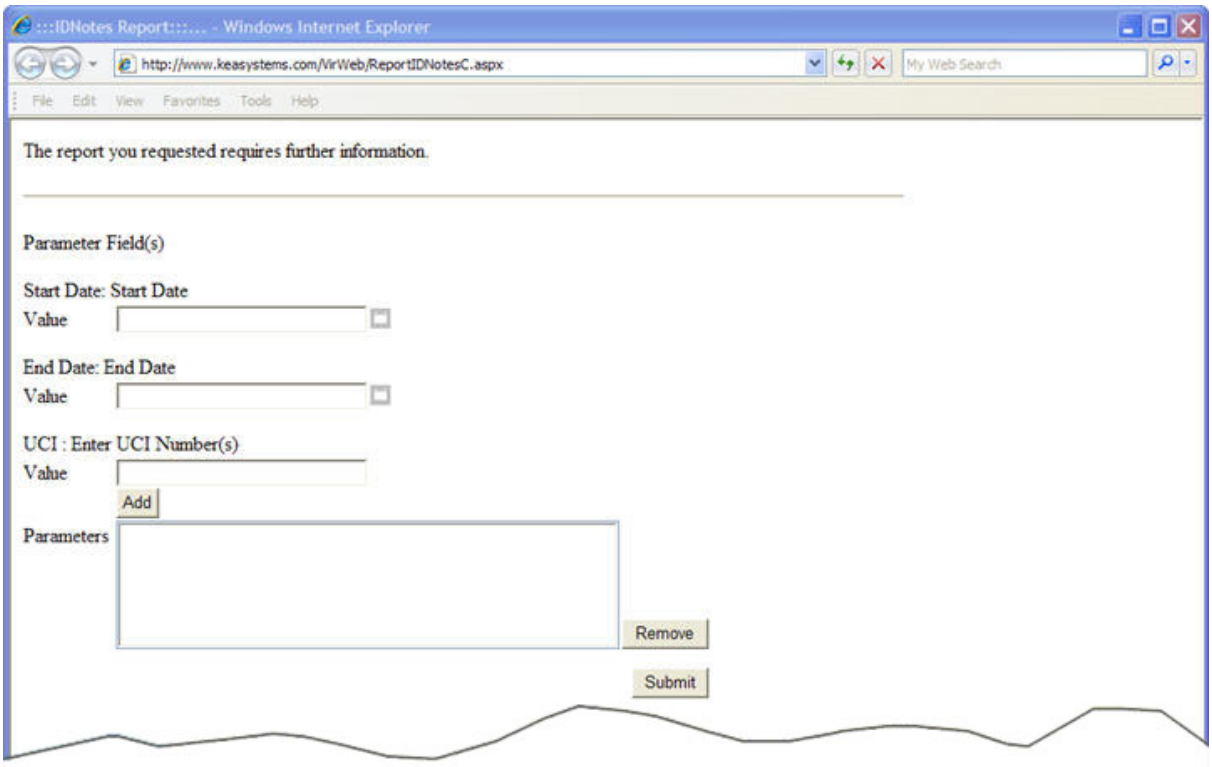

The first two fields have drop-down calendars. From the first, you can select the output destination; you can View the report on your screen ("Print the report to a window"), Export the report or Print the report. From the second field and drop down menu, you can choose when to run the report. You can either output the report immediately or choose a future time/date. Note that the display icon described above is not effective with Crystal Reports.

If you choose to display the report on your screen, you may also click on `Window Styles', allowing you to choose which buttons and/or controls you want displayed. If you choose to export the report, you may also click on `Export Options', which will allow you to select format and destination options. If you choose to print the report, you may select `Printer Options' which will allow you to set up a printer as well as choose your printing options.

Next, choose whether to `Use Saved Data' or `Refresh Data'. Generally, you should choose `Refresh Data' to ensure that your reports are using the most recent data available. If you choose `Refresh Data', make sure the `Modify Selection Formula' check box is NOT checked. Checking this box will allow you to change the default settings, which could cause problems when displaying the report. Select the `Print' button to View/Export/Print the report. If you chose to view the report, it will open in a separate window.

3.11 Messages

This function is an intra-agency messaging system and should not be confused with e-mail message which can also be generated from within **eChart**, for example in the SIR process. The Message window is very intuitive and resembles MS Outlook and if you are familiar with that program, use of this message system will be easily learned. Some messages are created by the functions within **eChart** and the Status Pop-up Window that is displayed when you enter **eChart** will display these and all other new messages.

Messages Window

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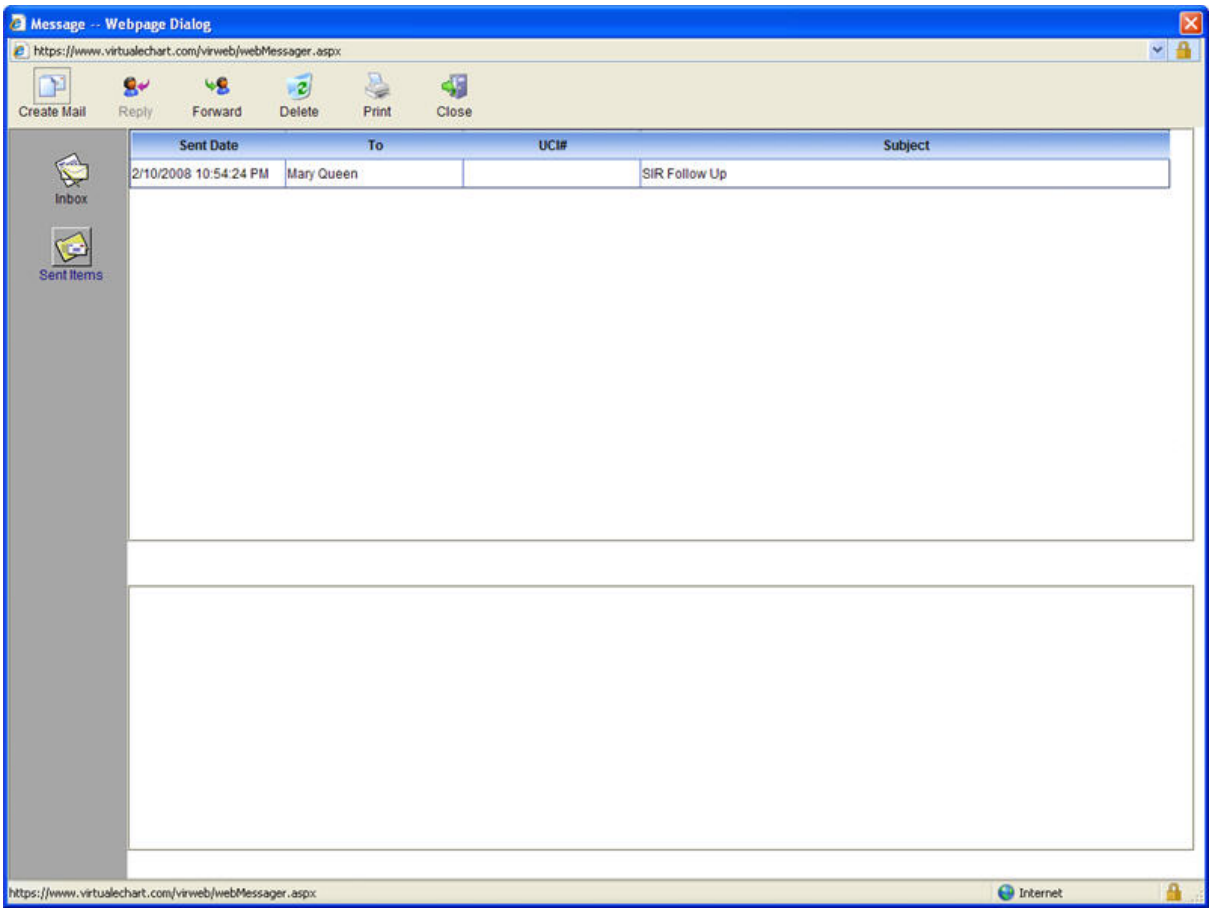

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Top Level Intro

This page is printed before a new
top-level chapter starts

Part

4 Glossary

4.1 Glossary

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